



U.S. Department of State FY 2000 Country Commercial Guides: France

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I. EXECUTIVE SUMMARY

This Country Commercial Guide (CCG) presents a comprehensive look at France's commercial environment using economic, political and market analysis. The CCG's were established by recommendation of the Trade Promotion Coordinating Committee (TPCC), a multi-agency task force, to consolidate various reporting documents prepared for the U.S. business community. Country Commercial Guides are prepared annually at U.S. embassies through the combined efforts of several U.S. government agencies.

The market in France has long been and will continue to be of importance to U.S. suppliers across a wide range of industrial and consumer goods, food & agricultural products, and services. France is the ninth-largest trading partner of the United States worldwide in terms of two-way trade, and the third-largest in Europe (after the United Kingdom and Germany). The United States and France share many trade similarities, in particular their status as the world's top 2 exporting countries in 3 key sectors: defense products, agricultural goods, and services. Franco-American trade is also remarkable for its symmetry, as the majority of the top 15 export products are the same each way. Nonetheless, France's major partners are within the European Union.

France has the world's fourth largest industrial economy, with an annual GDP about one-fifth that of the United States. The disposable income of France's 60 Million population averages around \$20,000 per capita, and memberships in the G-7, European Union, World Trade Organization and OECD confirm the status of France as a leading economic player in the world. In 1998, French GDP grew by 3.3% in real terms, an encouraging improvement over 2.1% real growth in 1997. The outlook for 1999 and 2000 is for continued growth, although at rates below that of 1998; the government projects growth in the range of 2.2%-2.5% in 1999.

France's Socialist government is concentrating on implementing a domestic agenda focused on economic growth and bringing down high unemployment, which stood at to 11.5% by the end of the year. Efforts to implement a reduction of hours worked from 39 to 35 hours per week, as a spur to create jobs are ongoing. January 1, 2000 is set as the date for such a reduction to take effect, for all but the smallest firms. The economic impact of the transition to the 35-hour work week is uncertain, depending on the outcome of negotiations over wages and work schedules, to conclude by the end of 1999. Government efforts to sell-off shares of French enterprises continues, but the government still controls 54% of GDP. In addition, the French concept of a "golden share" gives the government a virtual veto in strategic moves by key firms in the economy. Progress has been made in privatization and the reduction of budget deficits, but taxes remain the highest in the G-7 industrial countries, regulation of goods and labor markets is pervasive, and structural changes are likely to be spurred by world competitive pressures or by the European Union.

Both President Chirac and Prime Minister Jospin are strong advocates of European Union, as a way to strengthen France both politically and economically. France's adoption of the Euro as their single currency will also increase competitive pressures on French companies.

In general, the commercial environment in France is favorable for sales of U.S. goods and services. Marketing products and services in France is almost like marketing them in the U.S., notwithstanding some significant differences in cultural factors and legal restrictions. As reflected in the growth of direct marketing and franchising, American sales concepts tend to influence French marketing practices and distribution channels. While use of the Internet is rapidly increasing, electronic commerce in France is still dominated by the huge, but fading, installed base of France Telecom "Minitel" units. France is poised for an internet "revolution".

The leading non-agricultural products considered to offer "best prospects" for U.S. business in France are (in order of market size): computer software, computers and peripherals, electronic components, security & safety equipment, textiles, aircraft & parts, telecommunications equipment, scientific laboratory equipment, medical equipment, environmental technology equipment and services, automotive parts and services equipment, automobiles and light trucks, and agricultural machinery. On the services side, the French markets for travel and tourism, employment services, franchising and telecommunications services hold the most export potential for American suppliers. Travel and tourism is the largest U.S. "export" earner.

French imports of U.S. food and agricultural products (including manufactured tobacco, spirits, and wood products) during Calendar Year 1998, were valued at \$980 million, a 12 percent increase from 1997. French imports of U.S. food and agricultural products continued to increase for consumer-ready foodstuffs, and increased also this year in bulk commodities. In 1998, fresh and dried fruits (including nuts), were the leading U.S. agricultural exports to the French market valued at \$118 million. Fish and seafood products (fresh or frozen), and processed fruits and vegetables (including fruit juices) were the second and third largest export items, valued at \$107 million and \$81 million, respectively. The French market for food products is mature, sophisticated and well-served by suppliers from around the world. Generally, high quality food products with an American image can find a niche in the French market, particularly if they can gain distribution through stores and supermarkets that specialize in U.S. or foreign foods. Niche market opportunities also exist for regional American foodstuffs (Tex-Mex, Cajun and California Cuisine), candies and chocolates, wild rice, and organic and health food products.

France offers a variety of financial incentives to American and other foreign investors, and its investment promotion agency, DATAR, provides extensive assistance to potential investors both in France and through its agencies around the world. Financial subsidies and tax incentives are offered to attract investment to the country's economically depressed areas. Foreign companies registered in France receive the same treatment with respect to participation in technology development programs sponsored by the French government and have equal access to R&D funding. Though some aspects of the investment climate could stand improvement, especially the tax structure, (there are over 100 taxes in France), France continues to offer attractive investment opportunities.

In support of U.S. commercial interests in France, the U.S. Embassy in Paris

uses the combined resources of the various agencies to promote U.S. business interests and to remove barriers to increased exports of U.S. goods and services, to supply information on areas of trade and investment opportunity, and to advocate effectively on behalf of U.S. firms.

Country Commercial Guides are available for U.S. exporters from the National Trade Data Bank's CD-ROM or via the Internet. Please contact STAT-USA at 1-800-STAT-USA for more information. Country commercial guides can be accessed via the World Wide Web at: [HTTP://WWW.STAT-USA.GOV](http://WWW.STAT-USA.GOV) and [HTTP://WWW.STATE.GOV](http://WWW.STATE.GOV) and [HTTP://WWW.MAC.DOC.GOV](http://WWW.MAC.DOC.GOV). They can also be ordered in hard copy or on diskette from the National Technical Information Service-NTIS at 1-800-553-NTIS. U.S. exporters seeking general export information/assistance and country-specific commercial information should contact the U.S. Department of Commerce, trade information center by phone at 1-800-USA-TRAD (E) or by fax at (202)482-4473.

II. ECONOMIC TRENDS AND OUTLOOK

A. Major Trends and Outlook

In 1998, French GDP grew by 3.3% in real terms. This was the best performance in 10 years and a marked improvement over 2.1% real growth in 1997. Inflation remained low and under control. Stronger growth also contributed to a reduction in the unemployment rate to 11.5% by the end of the year. The financial services sector was the fastest growing sector, followed by other services sectors. The construction industry contracted by 0.5% in real terms.

The outlook for 1999 and 2000 is for continued growth, although at rates below that of 1998. The government projects growth in the range of 2.2%-2.5% in 1999. Much of the lower growth is due to a contraction in export growth rates in the wake of the Asian financial crisis.

Despite its positive short-term prospects, however, most observers believe the French economy is operating below its long-term potential. Reaching that potential will require continued deregulation and a reduction of the role of the state in the economy. Progress has been made, notably in privatization and reduction of budget deficits, but taxes remain the highest in the G-7 industrial countries and regulation of goods and labor markets is pervasive. The economic impact of the transition to the 35-hour workweek as of January 1, 2000 is uncertain, depending on the outcome of negotiations over wages and work schedules that are scheduled to conclude by the end of 1999. France's adoption, along with 10 other EU countries of the euro as their single currency will increase the competitive pressures on French companies and the French economy.

B. Principal Growth Sectors

In 1998 the five fastest growing sectors, as measured in real terms in the new 1995 accounting basis, were automobiles (12.9%), services to companies (6.1%), capital goods (5.7%), transport (4.5%) and consumer goods (3.7%). As measured in nominal terms these sectors represented 1.4, 15.5, 3.6, 4.4 and 3.6% of total value added, respectively.

C. Government Role in the Economy

France has a centuries-old tradition of highly centralized administrative and governmental control of its essentially market-based economy. In 1998, total general government outlays amounted to 54% of GDP. Considerable progress has been made in privatization, although the the government maintains a large presence in industries such as aeronautics, defense, banking, and telecommunications, and can still exert control over privatized firms (see attached discussion of "golden share" provisions in section VII).

D. Balance of Payments

France has run overall trade and current account surpluses in recent years. However, according to French government data, France runs a deficit in its trade with the United States. (U.S. data tell a somewhat different story,

which is usually explained by the significant amounts of U.S. products that are re-exported to France from third countries.)

Among third country markets and suppliers, the United States is the second largest supplier of food and agricultural products to France, after Brazil, and the largest export market for French agricultural products outside of the European Union. According to French Customs data, the value of French agricultural exports (including spirits, manufactured tobacco, and wood and products) to the United States in 1998 was \$1.9 billion, while the value of French agricultural imports (including spirits, manufactured tobacco and wood and products) from the United States during the same period was \$980 million, leading to a positive agricultural trade surplus for France with the U.S. of \$884 million

E. Trade Barriers

As a member of the European Union, France shares common tariff and, in many cases, non-tariff external barriers with other members of the Union. Product safety and sanitary standards affecting imports into France are increasingly established at the EU level. The United States and EU have negotiated Mutual Recognition Agreements covering certain product standards which should ease entry into EU and French markets for U.S. firms. Despite occasional highly publicized disagreements, the sizable bilateral trade between the U.S. and France is for the most part non-controversial.

G. Labor Force

France's private sector labor force is one of the country's strongest points in attracting foreign investment, combining high quality with competitive unit wage costs.

The labor code sets minimum standards for working conditions including the work week, overtime, vacation and personal leave. Other labor standards are contained in collective agreements, which are usually negotiated on a national or regional basis by the various unions and employers' associations. French absenteeism is modest by European standards and, in the private sector, peaceful labor relations have prevailed.

While the rate of unionization in France has steadily declined to about half that of the United States, French labor law provides an extensive institutional role for employee representatives and for organized labor.

- In companies with more than 10 employees, employee delegates are elected for a one-year term. They are authorized to present individual or collective claims and grievances relating to working conditions, to inform government labor inspectors of any complaints under the labor law, and to concur with management in any reorganization of the work week. Management is required to meet with employee delegates at least monthly.
- A company with more than 50 employees must have a joint management/employee enterprise committee, to which employee representatives are elected. The committee must be consulted for all major corporate decisions, but has no veto. The enterprise committee must be

provided with the same information that is made available to shareholders. It is funded by the company at a rate equal to at least 0.2 percent of the firm's payroll, and uses this money to finance social and cultural activities for the benefit of employees.

- Workers also hold most slots on occupational health and safety committees, which are mandatory in medium and large size companies. Labor tribunals (playing a role largely equivalent to the NLRB in resolving labor disputes) are comprised of equal numbers of union and employer representatives. Appeals are possible to the level of the Cour de Cassation, one of France's high courts.

H. Major and Third Country Competitors

As the world's fourth largest economy, centrally located within the European Union, there is strong competition for market share in all French industrial and services sectors. American exporters to France generally face more competition from European companies than from Asian ones, although Japanese companies have successfully established a foothold in the French market, primarily through investment. German companies tend to be strong competitors, building on the many Franco-German joint ventures. Each sector has its own characteristics and should be carefully analyzed as part of a strategy to capture a share of the French market.

I. Infrastructure Situation

France's transportation infrastructure is among the most sophisticated in the world, benefiting from advanced technology and extraordinary investment by the government. The three main entry points for air-freight are the Orly and Charles de Gaulle airports in Paris and Lyon's Satolas airport. France has twelve major seaports, many of which are equipped for container ships. There is also an extensive highway and river-transport systems and a state-owned rail network that is among the most comprehensive and technologically advanced in the world.

Communications infrastructure is similarly advanced. Telephone lines blanket the country and there is easy access to the Internet via French and foreign service providers. The French "Minitel" telephone based computer network is also widespread and provides many consumer services. France is behind the U.S. and some other countries in the use of personal computers and the Internet. The government is trying to promote better use of information technologies.

J. Major Infrastructure Projects Underway in France

1. Construction projects:

- a. Disneyland Paris expansion project (estimated at USD 670)
- b. Fast train project (TGV-Est) between Paris and Strasbourg
- c. Renovation of the Mont Blanc tunnel (estimated at USD 250 million)

III. POLITICAL ENVIRONMENT

A. Bilateral Relationship

France and the U.S. are long-standing, close allies, as witnessed by the recent Kosovo crisis. Despite occasional differences of view, the U.S. and France work together on a broad range of trade, security and geopolitical issues. In general, the U.S. and France agree on strategy, even if they may differ on tactics.

B. Political System

France is a democratic republic whose political system is based on a written constitution which was approved by referendum in 1958. According to the French Constitution, the President of the Republic is elected by direct suffrage every seven years. The President presides over the cabinet, commands the armed forces, and concludes treaties. He is also empowered to dissolve the National Assembly and, in certain emergency situations, may assume full power. The President appoints the Prime Minister, but because France's political system is a hybrid of presidential and parliamentary elements, the composition of the National Assembly (the lower house of the French parliament) determines the party or political grouping from which the President must choose his Prime Minister. Especially in recent years, this has frequently resulted in the head of state and the head of government being from opposing parties, in an arrangement known as "cohabitation". Currently, center-right President Jacques Chirac "cohabits" with a government of the center-left that was elected in June 1, 1997. The Socialist coalition includes representatives of the Communist and Green parties and is headed by Prime Minister Lionel Jospin, former Minister of Education & Head of the Socialist Party. Jospin ran unsuccessfully against Jacques Chirac in the 1995 presidential elections.

The Constitution provides for a bicameral parliament consisting of a National Assembly and a Senate. National Assembly deputies are directly elected by universal suffrage for five-year terms. Senators are indirectly elected for nine-year terms; one-third of the Senate is renewed every three years.

The French political spectrum includes numerous political groups. Key among these, from the right to the left, are: the extreme right National Front (FN); the neo-Gaullist Rally for the Republic (RPR); the moderate Union for French Democracy (UDF); the Socialist Party (PS); the Green party; and the Communists (PCF). Other smaller parties have minimal national political impact, but exert influence on a local and even occasionally on a national level.

C. Political Events Affecting Business Climate

The current cohabitation between center-right President Chirac and Socialist Prime Minister Jospin has proceeded smoothly and enjoys strong backing from the French public. This was especially true during the Kosovo crisis, when both halves of the French executive united in favor of NATO military action and each received record high approval ratings. Competition between Chirac and Jospin has also been restrained because continued disarray among center-right parties has limited the opposition's effectiveness, thus depriving Chirac of a solid base from which to challenge Jospin. For his part, Jospin has preferred to consolidate the Socialists' record in office before turning his attention to the next presidential election. Notwithstanding municipal elections in 2001, the absence of national elections before parliamentary and presidential elections in 2002 means that both men will choose carefully their subjects for disagreement.

In the meantime, the Socialists are concentrating on implementing a domestic agenda focused on economic growth and bringing down high unemployment. Fiscal policy has emphasized meeting budgetary disciplines set forth under the Maastricht Treaty. The government has made some initial progress in lightening the tax burden on employers to stimulate job creation but has hesitated to take more fundamental structural reforms. Efforts to implement a reduction of worktime from 39 to 35 hours a week as a spur to create jobs are ongoing, with January 1, 2000 set as the date for such a reduction to take effect for all but the smallest firms. A law implementing the precise terms of worktime reduction will be debated by Parliament later this year. The Jospin government has put off reform of the pension system, mindful of the bitter experience of its center-right predecessor when it attempted to tackle this highly emotional issue. Nonetheless, the government has indicated it will turn its attention to pension reform after the 35-hour workweek is set in place.

Both Chirac and Jospin are strong advocates of European Union. They view a strong Europe as a way to strengthen France, both economically and politically. The French are also fully supportive of Economic Monetary Union (EMU), and France is one of the eleven initial members of EMU. French efforts to elaborate a detailed European plan to stimulate job creation, however, have so far been unsuccessful.

Chirac's decision in 1996 to streamline defense industries and to restructure the armed forces has led to mergers and industrial realignments among French defense firms in 1998 and 1999. The Jospin government has helped to move ahead in privatizing and merging defense industries, such as Thomson-CSF and Aerospatiale-Matra.

IV. MARKETING U.S. PRODUCTS AND SERVICES

The United States and France produce many of the same goods and services and export them to each other. Therefore, marketing products and services in France is somewhat like marketing in the U.S., with several significant differences. Following is a general overview of marketing in France. Specific counseling sessions with trade specialist of the United States Department of Agriculture/Foreign Agriculture Service or the U.S. Commercial Service are recommended for those wishing more details.

A. Distribution & Sales Channels

The Retail Network

France possesses a diverse and comprehensive retail network, which increasingly resembles that of the United States.

Small- and medium-sized family-owned firms, which traditionally accounted for a majority of French wholesale and retail trade, are rapidly losing ground to hypermarkets and supermarkets - large retail outlets carrying a wide variety of products at discounted prices. At the same time, mail order marketing and specialized chain stores have shown strong growth, further demonstrating the changing needs and preferences of consumers. In contrast, a law limits the amount of retail space that can be purchased or leased commercially, and a special exemption certificate is required for space beyond 300 square meters.

Primary Retail Channels:

- Grands magasins - Department Stores
- Hypermarchés - Hypermarkets
- Supermarchés - Supermarkets
- Magasins populaires - Convenience Stores
- Magasins discount - Hard Discounters
- Grandes surfaces spécialisées - Large Specialized Stores
- Multi-Channel Retail Groups
- Vente par catalogue - Mail-order Marketing
- Centrales d'achats - Central Buying Offices

Department Stores: In 1998, there were some 161 department stores, employing 28,830 people and totaling US 6.68 billion in sales. Paris has the highest number of department stores of any French city, and six of the ten top-selling stores are located there. Department stores have lost some market share in all areas except in the medium-to-high price range. A unique feature of the French department store is that many non-food products are sold by the manufacturer's own sales staff, which can account for up to 20 percent of the store's total sales force.

Hypermarkets: Hypermarkets are technically defined as stores with a minimum selling area of 2,500 square meters. On average, French hypermarkets are self-service retail stores carrying 25,000-40,000 food items and 3,500-5,500 non-food articles at competitive prices. They are generally located in suburbs, and cover a total sales area of 6.4 million square meters. As of January 1, 1999, there were 1,126 hypermarkets, employing 227,500 people. The top five hypermarket companies are Leclerc, Carrefour, Auchan, Geant and Continent.

Supermarkets: Supermarkets are also self-service retail stores. In essence, supermarkets are smaller versions of hypermarkets, with a selling area between 300 and 2,399 square meters. They usually carry 4,000-5,000 food items and 1,000-2,000 non-food articles, and cover total sales area of 7.8 million square meters. As of January 1, 1999, there were 7,999 supermarkets, employing 163,300 people. The top five supermarket companies are Intermarché, Champion, Super U, Stoc, and Casino.

City-Center Stores:

Defined as high quality supermarkets, and dating back to the turn of the century, these establishments are smaller than regular supermarkets, are usually located in town centers and offer a wide selection of food and non-food products. These stores number about 500 in total and tend to be grouped under major leading companies such as Monoprix/Prisunic.

Hard Discounters: Hard Discount Stores trade principally on the basis of low price. They do not offer a comprehensive range of goods and are, thus, not as convenient as supermarkets and hypermarkets. As of January 1, 1999, there were a total of 2,150 hard discount stores in France. These stores represent about 8 percent of total food sales either under their private label or branded products. They generated total sales of US 11.29 billion in 1998. The top five hard-discount companies are Lidl, Ed, Aldi, Leader Price and Le Mutant.

Large Specialized Stores: Large specialized stores offer an extensive choice of goods in a specific category at a competitive price and with an emphasis on customer service. With over 6,500 stores of this type, this dynamic sector generates US 20 billion in sales. Do-it-yourself equipment stores are the most numerous (2,510), followed by furniture stores (1,209).

Multi-Channel Retail Groups: The distinctions made above between hypermarket chains, supermarket chains, etc. are becoming blurred. In the last several years, major multi-channel retail groups have emerged, which own chains of different types of stores. Pinault-Printemps and Nouvelles Galeries Reunies fall into this category, because they own chains of specialty and convenience stores.

Mail Order Marketing: The French mail order market for consumer products is the fourth largest in the world. This market has tripled in the last ten years, reaching US 8.4 billion in 1997. One out of two French households buys through mail order. Textile products make up 46 percent of mail-order sales, books and records 14 percent, and furniture and home decoration 10 percent.

Central Buying Offices: In addition to contacting the largest store chains listed above, introducing products via central buying agencies is an excellent distribution method. A complete list of French central buying agencies, the Annuaire des Supermarches, Hypermarches, Centrales d'Achat et Groupements d'Achats, is available for about US 150 (freight included) from:

L.S.A
Mrs. Majeau
12/14, rue Mederic
75817 Paris Cedex 17
France
Tel: (33) 1.56.79.43.00
Fax: (33) 1.56.79.43.06

Distribution Channels for Food Products in France

France has one of the most highly developed distribution systems for agricultural and food products in the world. There is an extensive network of transportation and distribution channels that ensure consumers will receive the final product in good quality and at the proper time.

Normally, French imports of agricultural and food products are brought in from the west Atlantic via the northern French port of Le Havre, or via the ports of Antwerp, Belgium and Rotterdam, The Netherlands. Imports from the Mediterranean and African countries enter through the southern port of Marseille. Imports from other EU and European countries are often brought in by truck through the world's largest wholesale food market at Rungis, located south of Paris. Since much of the processed food products in France are of domestic origin, there are well-developed regional markets throughout the country.

Despite the fact that France has a very modern and relatively efficient distribution and transport system, frequent disruptions occur in product transport, due to unexpected strikes by port dockers or truck drivers, or some other labor dispute. Fortunately, the availability of alternative entry ports minimizes the magnitude of this problem for U.S. exporters.

Wholesale Distribution

There are about 30,000 wholesalers of food and agricultural products in France. The food industry, however, continues to consolidate and diversify, with individual firms adding new services to their basic wholesale activities. Wholesalers now offer a whole "menu" of services for small and medium-sized food retailers and processors. Other services which wholesalers are adding to their repertoire include deliveries to restaurants and other food institutions, as well as distributing new-to-market products for a fee. In spite of their efforts to consolidate, many traditional French wholesale food companies continue to lose ground to large super, and hypermarket chains, as well as to "hard discounters," which are increasingly expanding their own wholesale activities. Also, most of the major supermarket companies produce their own private labels for distribution, which effectively reduces the business for traditional wholesalers.

There are, throughout France, 17 wholesale markets generating total sales in 1998 of about \$11 billion. The largest wholesale market is Rungis, just outside of Paris, which groups together the traditional trade between suppliers, and clients, and complementary services, i.e., meat and cheese cutting, ripening, storage, packaging, health controls, logistics, etc. Rungis international market covers five product sectors: fruit and vegetables, meat products and preparation, seafood products, dairy and catering products (delicatessen, wines, etc.) and horticultural products. Next to the product sectors, the business center groups together the service companies to meet all business needs. The wholesale international market at Rungis is the most important fresh product market in the world. Rungis' sales total some \$6.4 billion annually. Its coverage area supplies around 12 million consumers.

For wholesalers of manufactured goods, the growth of hypermarkets and supermarkets, as well as hard discounters, offer a myriad of opportunities (see the list attached).

Retail Food Distribution Channels

There are six principal categories of retail food outlets in France. The first five categories (hard-discounters, hypermarkets, supermarkets, city-center stores and department stores) represent the mass distribution outlets. These categories control more than 78 percent of total food distribution in France. Total hyper and supermarket sales account for 60 percent of total French food sales. The sixth category, traditional outlets, includes two types, neighborhood and specialized food stores.

Small-and medium-sized family-owned firms, which have traditionally accounted for a majority of French wholesale and retail trade, are rapidly losing ground to hyper/supermarkets - large retail outlets carrying a wide variety of products at discounted prices. At the same time, mail order marketing and specialized chain stores have shown strong growth, further demonstrating the changing needs and preferences of consumers.

Mass Distribution Outlets: Hard Discounters, Hypermarket, Supermarkets, City-Center Stores, and Department Stores

Department Stores :

Some of the major department stores in Paris, such as Galeries Lafayette, Printemps, and Bon Marché, have gourmet food sections. Although they are not of great importance with regards to total food sales in France (about one percent), they set the standard for quality product presentations.

In the past couple of years, department stores, such as "Galeries Lafayette," tested a cyber service home delivery. "Cybermarket" is the first home delivery in France accessible from the Internet network. Department stores also have a home delivery service, such as the "Telemarket," of the Galeries Lafayette, which has been operating since 1985.

Traditional Outlets:

The growth of mass distribution outlets is a threat for small neighborhood convenience shops and specialized food stores. Traditional outlets handle

about 22 percent of retail food distribution in France, and specialized stores, such as bakeries, cheese, fruit and vegetable stores, as well as butcheries and delishops, are still well placed in the French food market, with a total of 122,280 shops.

Hotel, Restaurants Food Institutions (HRI)

According to the French Institute for Statistics (INSEE), the HRI sector has been increasing for several years. In 1998, this sector generated annual sales of \$47 billion through approximately 4,500 billion of meals served, an increase of 11.3 percent in meals served over 1997. The HRI sector represents 15 percent of total sales of the French food industry.

The HRI sector is divided into the hotel/restaurant sector and the institutions sector. The hotel/restaurant sector represents about 35 percent of meals served in about 155,000 establishments. The French market for the hotel/restaurant sector is dominated by fast foods, sandwich shops and theme restaurants. The institutions sector represents 65 percent of meals served in 50,000 units (hospitals, schools, universities, and workplaces).

B. Use of Agents and Distributors

Considering the host of distribution options available in France, it is important for the would-be exporter to select the method best suited to his or her product. French buyers generally prefer to purchase through an intermediary, making sales directly to the end-user a scarce practice. However, sales of expensive, technically sophisticated goods are an exception to this rule.

Intermediaries may take one of three primary forms under French law:

- Distributor
- Agent
- Salaried Representative

Distributor

A distributor (concessionnaire) is an individual or legal entity who purchases goods directly from a producer for the purpose of resale. The distributor operates independently and is only bound by the written provisions of the distribution agreement. These agreements, however, are subject to specific rules and regulations regarding exclusive distribution and price-fixing.

Contract termination is an important concern, and vary with the type of distribution agreement. A distribution agreement of specified duration may be terminated at the end of the contract period by either party without prior notification or indemnification. If the termination takes place before the end of the contract period, the terminating party may be sued for breach of contract.

A distribution agreement with an unspecified duration may be terminated by either party without indemnification after a fair notice period, usually six

months. The termination of such a contract by the producer without fair notice may be grounds for damage claims by the distributor. In other words, U.S. exporters should ensure that each distribution agreement has a specific termination date.

Agent

This category covers commercial agents as well as those persons acting as agents but not fulfilling the requisites for commercial agent status. Unlike distributors, agents do not actually purchase goods for resale; instead, they match up buyers and sellers on a commission basis. All agents exercise their activities in an independent manner, and their principals are exempt from payment of payroll taxes. Agents assume their own fiscal charges (business license tax and value-added tax) and social charges (health insurance, social security and retirement/pension benefits).

Commercial Agent: Agents with a written contract have the status of commercial agents (agents commerciaux) if they exercise their activity as a sustained independent profession and fulfill the following conditions:

- do not have a written employment contract;
- negotiate sales and purchases on behalf of producers, manufacturers, or dealers;
- are registered with the Tribunal of Commerce as commercial agents.

A commercial agent is independent and free to act on the behalf of any other firm. However, in the case where the agent wishes to represent one of his or her principal's competitors, consent of the principal must first be secured.

The principal may justifiably terminate the commercial agent contract only if the agent shows substantial deficiency in carrying out his or her obligations. Otherwise, contract termination gives the agent a right to indemnification, often equal to two years' commission.

Other agents: Persons who do not fulfill all the requirements for commercial agency, and who are not in a position of subordination to the company they represent, are considered agents. Authorization of an agent can be effected by notarial act or private agreement. Either party may terminate the agency agreement at will, but the non-terminating party has a right to indemnification of losses.

Salaried Representatives

Unlike agents, salaried representatives have employment contracts. They and their employers share the burden of payroll taxes contributing to social security, unemployment compensation, and retirement/pension plans.

Statutory Representatives: Whatever their qualifications or title, persons are considered statutory representatives if they exercise their activity as a sustained independent profession and fulfill the following conditions:

- engage in the activity of a sales representative for the account of one or

more employers;

- desist from executing commercial operations on their own behalf;
- institute mutual commitments with employers regarding the nature of: the goods or services offered for sale, the region of activity or the category of clients, and the rate of compensation.

Statutory representatives, like all employees, perform their work according to the instructions of their employers and benefit from the system of labor law protection. However, they possess a special right to indemnification if their employment is unjustly terminated. This indemnity is based on the size and importance of the clientele created by the statutory representative.

Nonstatutory Salaried Representatives:

Representatives who are subordinate to their employers and who do not fulfill the requisites for statutory representative status fall into a separate category and are considered regular employees.

Finding a Partner

The U.S. Commercial Service offers several services to help the would-be exporter identify potential foreign representatives. To request these services, firms should contact the nearest U.S. Department of Commerce District Office. The number can be found in the US government pages of your telephone directory, or you may call 1-800-USA-TRADE. The webpage is <http://www.usdoc.gov>

Contacting and Evaluating Potential Representatives

Once the U.S. company has identified several potential representatives, it should contact them directly in writing. Just as the U.S. firm is seeking information on the French representative, the representative is interested in corporate and product information on the U.S. firm. The U.S. firm should provide full information on its history, resources, personnel, the product line, previous export activity, and all other pertinent matters.

At the same time the firm is providing information on itself, it should also engage in a thorough investigation of the potential representative. Following is a list of important facts the firm should endeavor to find out:

- Current status and history, including background on principal officers
- Personnel and other resources
- Sales territory covered
- Current sales volume
- Typical customer profiles
- Methods of introducing new products into the sales territory
- Names and nature of U.S. firms currently represented
- Trade and bank references
- Assessment of whether U.S. firm's special requirements can be met
- View of in-country market potential for the U.S. firms products

The U.S. firm should not hesitate to ask potential representatives or distributors detailed questions; exporters have the right to explore the qualifications of those who propose to represent them overseas.

In addition, the U.S. firm is advised to obtain at least two supporting business and credit reports to ensure that the distributor or representative is reputable.

The French agency of Dunn & Bradstreet offers this service.

Dunn & Bradstreet France
Service Renseignements de Notoriété
Immeuble Defense Bergeres
345, avenue Georges Clemenceau
92100 Nanterre
France
Tel: (33) 1.41.35.18.98
Fax: (33) 1.41.35.17.00

Negotiating an Agreement with a French Representative

Once the U.S. firm has selected a prospective representative, the next step is to negotiate a foreign sales agreement. The content of this agreement is extremely important, as it will determine the legal basis for any relationship between the exporter and the representative. Although U.S. Department of Commerce Export Assistance Offices can provide counseling to firms planning to negotiate agreements with French representatives, engaging a French lawyer is **strongly** advised.

In drafting the agreement, special attention must be paid to safeguarding the exporter's interests in cases in which the representative proves less than satisfactory. Procedures and conditions for terminating the relationship should be clearly defined. Furthermore, any right to indemnification on the part of the exporter or distributor should be specified.

C. Franchising

The French franchise industry is ranked first in Europe. Although it is a very competitive market, it offers however many opportunities for U.S. franchises. Out of a total of 61 foreign franchises in France, 28 are American, accounting for 3 percent of the total franchise market. The market size in 1998 was USD 32.1 billion. The estimated annual growth rate for 1998-1999 is 5 percent. Sales by U.S.-owned companies are expected to reach USD 1,029 million in 1999. Fast-food has been the most successful sector, but is now very competitive. However, there remains potential for specialty restaurants. The greatest potential for U.S. franchisors lies in sub-sectors yet to be fully exploited, such as computer education, internet services renovation services or shopping services for working couples.

D. Direct Marketing

Direct marketing in France is a fast growing industry with sales evaluated at

USD 8.7 billion in 1998. This figure includes expenses for all direct marketing media: mailings, catalogs, telephone marketing, targeted and non-targeted fliers, press and television.

The market is expected to grow at the rate of 3 percent per year. While accounting for 2.4 percent of total retail sales, mail order business has been growing faster than retail business. Catalog sales reached USD 7 billion in 1998, representing 80 percent of the total market. Catalog sales remain a good opportunity for U.S. companies. U.S. companies rank second after German companies in mail order sales in France with USD 383 million in sales. The best prospects for growth are specialty catalogs which would sell apparel, books, records as well as entertainment videos since they are the most ordered items. However, there is room for specialty catalogs that would take advantage of unexploited sectors.

E. Approaches to the French Market

American companies have prospered in the French market and will continue to do so if special attention is paid to the European market and the products/services offered by competitors in Europe. The best "first step" is to appoint an agent or distributor; however, expansion in the market can take various other forms, depending on the product/service.

Joint Venture/Licensing

A joint venture with a French firm having similar commercial interests is one recommended approach. The French government encourages this type of investment and offers a wide range of incentives. In selecting a joint venture partner, the American company must carefully analyze its strengths and weaknesses, and search for a firm that offers the appropriate support. Traditionally, a French joint venture partner strengthens the marketing activities of an American firm with its in-place distribution system. In certain industries, French manufacturers have skills that augment those of the American partner. Financing is also of special concern. Each joint venture proposal requires special analysis and conditions if it is to be successful. A joint venture with a French firm that has full French government support can be beneficial as long as manufacturing decisions can be made independently of government involvement. Recognizing the differences in each market is essential for success; consequently, it is recommended that companies interested in forming joint ventures consult with the Commercial Service in Paris before making any alliances.

Steps to Establishing an Office

Establishing a subsidiary/branch office in France is also an advisable approach for some industries. The French government encourages the formation of new enterprises and, in conjunction with the Paris Chamber of Commerce and other Chambers throughout the country, offers extensive counseling and assistance to those wishing to set up an office in France. Detailed "how to" guides are available not only from the various chambers of commerce, but also from the Commercial Service and the numerous American consulting firms present in France.

F. Selling Factors/Techniques

Selling your product or service in France is somewhat similar to the United States. Buying decisions are made on the basis of quality, price and after-sales service. The principal difference in France is, in fact, the language, followed by European laws. Since August 1994, the "Loi Toubon" requires that all advertising, labeling, instructions and promotional programs be in French. Consequently, we strongly recommend close contact with the Commercial and Agricultural sections in the Embassy, as well as arranging for local legal representation.

Advertising and Trade Promotion

There are far too many newspapers, magazines and technical journals to list; however, judicious use of the media is an important part of any and all promotional programs. Below is a list of the most prominent French newspapers and magazines:

Le Figaro

37, rue du Louvre

75081 Paris Cedex 02

France

Tel: (33) 1.42.21.62.00

Fax: (33) 1.42.21.64.05

Yves de Chaisemartin, President and Managing Director

Franz-Olivier Giesbert, Editor

Le Monde

21 bis, rue Claude Bernard

75005 Paris

France

Tel: (33) 1.42.17.20.00

Fax: (33) 1.42.17.21.21

Jean Marie Colombani, President and Managing Director

Alain Fourment, General Secretary

L'Express

17, rue de l'Arrivée

75733 Paris Cedex 15

France

Tel: (33) 1.53.91.11.11

Fax: (33) 1.53.91.12.10

Mr. Seillée, President and Managing Director

Denis Jeambar, Editor

Liberation

11, rue Beranger

75154 Paris Cedex 03

France

Tel: (33) 1.42.76.17.89

Fax: (33) 1.42.72.94.93

Serge July, Publisher

France Soir
45, avenue Victor Hugo
Bât. 265
93534 Aubervilliers Cedex
France
Tel: (33) 1.53.56.87.00
Fax: (33) 1.53.56.87.68
George Ghosn, President and Managing Director
Jean-Claude Nardonnet, Editor

Le Parisien
25, avenue Michelet
93400 Saint-Ouen
France
Tel: (33) 1.40.10.30.30
Fax: (33) 1.40.10.35.16
Philippe Amaury, President and Managing Director
Fabrice Nora, Managing Director

International Herald Tribune
181, avenue Charles de Gaulle
92251 Neuilly Cedex
France
Tel: (33) 1.41.43.93.00
Fax: (33) 1.41.43.93.38
Richard Woolridge, President
Richard Goldmark, Editor

Le Nouvel Observateur
12, Place de la Bourse
75002 Paris
France
Tel: (33) 1.44.88.34.34
Fax: (33) 1.44.88.34.01
Claude Perdriel, President and Managing Director
Jean Daniel, Editor

Le Point
74, avenue de Maine
75014 Paris
France
Tel: (33) 1.44.10.10.10
Fax: (33) 1.43.21.43.24
Bernard Wouts, President and Managing Director
Jean Chmitt, Editor

Les Echos
46, rue la Boetie
75381 Paris Cedex 08
France
Tel: (33) 1.49.53.65.65
Fax: (33) 1.42.89.14.69
Mr. de la Barre de Nanteuil, President and Managing Director

Nicolas Beytout, Editor

L'Expansion and La Vie Francaise
Groupe Expansion
14, boulevard Poissonnière
75308 Paris Cedex 09
France
Tel: (33) 1.53.24.40.40
Fax: (33) 1.53.24.41.22
Damien Defour, President
François Roche, Editor

La Tribune Desfosses
Cote-Desfosses
42-46, rue Notre Dame des Victoires
75002 Paris
France
Tel: (33) 1.44.82.16.16
Fax: (33) 1.44.82.17.16
Fabrice LaRue, President and Managing Director
Philippe Mudry, Editor

Le Nouvel Economiste
10, rue de Faubourg Montmartre
75009 Paris
France
Tel: (33) 1.55.33.30.00
Fax: (33) 1.55.33.30.20
Françoise Sampermanf, President and Managing Director
Valerie Lecasble, Editor

G. Pricing Product

The U.S. exporter can usually determine the export price of his/her manufactured product using 70% of the domestic price (after deduction of all local marketing costs). This will allow the French importer to price imports from the U.S. on the same price level as an American counterpart. A simple way of comparing U.S. and French retail prices consists of taking the net U.S. retail price and comparing it with the French retail price without Value Added Tax, (V.A.T.) currently 20.6%. The French consumer is generally willing to pay a maximum of 10-15% over the American retail price.

When determining the export price, it is important to consider that if prices are FOB, the French importer will have to pay for transportation, insurance, customs duties, value-added tax and fixed fees per shipment.

Terms of Payment

For U.S. exporters, the financing of export sales is not basically different from financing domestic sales. The fundamental concern in both cases is that one is paid in a timely manner for the goods and/or services delivered.

France's modern banking system offers a full range of payment means, the most

significant of which are:

- commercial letters of credit
- sight and time drafts
- bank transfers
- certified checks

Although bank transfers and certified checks are fairly self-explanatory methods of payment, commercial letters of credit and sight and time drafts may be less familiar to the would-be exporter but are potentially attractive terms of payment.

H. Sales service/Customer support

Although less developed than in the U.S., French businesses also provide all kinds of services such as after-sales service, home delivery, maintenance contracts, warehousing facilities, hotlines, or toll free numbers for any technical assistance.

For some products such as electrical appliances, e.g. T.V., replacement service is available.

I. Selling to the Government

The French Government generally pursues procurement policies in accordance with EU regulations, which call for non-discrimination vis-a-vis foreign firms, but with a slight advantage to E.U. firms. In France, procurement regulations do not officially present barriers to entry for foreign firms. However, local political pressure and administrative procedures are often said to favor French companies.

French Government procurement comes under the jurisdiction of the Ministry of the Economy and Finance. The "Commission Centrale des Marches" (CCM), or Central Procurement Board, has overall responsibility for monitoring compliance with procurement regulations.

France, as a member of the EU, is obliged to follow EU public works regulations which require government purchasing entities to publish tender notices for all public works projects valued at over ECU 5 million, or approximately US 5.75 million. Tender notices that exceed this threshold must be published in the Official Journal of the European Union, as well as in the French Bulletin Officiel des Annonces des Marches Publics. In the case of Telecommunications, however, a European Community Utilities Directive (January 1, 1993) requires France to give EU bidders a three percent price preference and gives France the option to reject bids with less than 50 percent EU content. Certain defense-related industries are also excluded from regular procurement rules. In addition, public projects must conform to the following requirements:

- a minimum of 52 days is required for bid submissions after an offer is announced.
- the reason for a bid's rejection must be provided upon request.
- the values of the winning bids must be publicly disclosed.

For information on French Government procurement regulations and procedures,

contact:

CCM

Tour de Lyon
139, rue de Bercy
75012 Paris, France
Tel: (33) 1.44.87.17.17
Fax: (33) 1.53.17.87.04

Information on current and past French and EU procurement tenders and bids may be obtained through France's MINITEL service, an on-line information bank. This service offers up-to-date information and immediate access.

MINITEL Services Company
888 Seventh Avenue, 28th Floor
New York, NY 10106
Tel: (212) 399-0080
Fax: (212) 399-0129

Access to procurement tenders and bids may also be obtained by subscribing to the Official Journal of the European Union (OJEU), or the Bulletin Officiel des Annonces des Marches Publics (BOAMP). However, these publications often do not arrive from overseas in a timely manner. OJEU can be ordered from:

UNIPUB
4611F Assembly Drive
Lanham, MD 20706-4391
Tel: (800) 274-4888
Fax: (301) 459-0056

For subscriptions to BOAMP, contact:

BOAMP
Direction des Journaux Officiels
26, rue Desaix, France
75727 Paris Cedex 15, France
Tel: (33) 1.40.58.77.58
or (33) 1.40.58.75.00
Fax: (33) 1.45.77.10.85

J. Protecting your Product from IPR Infringement

Intellectual property consists of industrial property as well as literary/artistic property. Under the French intellectual property rights regime, industrial property is protected by patents, trademarks, and designs and models, while literary/artistic property is protected by copyrights.

By virtue of the Paris Convention and the Washington Treaty regarding industrial property, U.S. nationals are entitled to receive the same protection of industrial property rights in France as French nationals. In addition, U.S. nationals have a "right of priority period" after filing a U.S. patent, trademark, design or model, in which to file a corresponding application in France. This period is twelve months for patents and six months for trademarks, designs and models.

Patents

There are two types of patents: Patents of Invention (Brevets d'Invention) and Certificates of Utility (Certificats d'Utilité). Patents of Invention cover all inventions. Certificates of Utility cover all inventions except those of a pharmaceutical nature which are covered by complementary certificates (Certificats Complémentaires de Protection).

In order to qualify for patent protection, the invention must:

- * Have an industrial or agricultural application
- * Imply a non-obvious procedure, and
- * Have absolute novelty.

Duration: Patents for inventions have a twenty-year life span, after which they become part of the public domain. Certificates of utility have a six-year, non-renewable life span.

Patent Registration: Applications for patent registration must be filed with the French National Institute for Industrial Property, the "Institut National de la Propriété Industrielle (INPI)", before the invention is publicly disclosed. INPI receives applications, examines their validity, and registers the patents. After the application for a patent is filed, INPI conducts a check for comparable inventions. Upon approval and registration, a patented invention may be manufactured, operated, used or sold only with the authorization of the patent's owner. The owner can transfer, or sell the patent, or grant a license for others to use it. A patent must be used to be retained.

Applicants can consult INPI's library to check for the existence of similar inventions prior to filing.

INPI

Division des Brevets
26 bis, rue de Saint-Petersbourg
75800 Paris Cedex 08, France
Tel: (33) 1.53.04.53.04
Fax: (33) 1.42.94.02.09

Patent protection in France may also be obtained through ownership of a European Patent, which is filed through the European Patent office in Munich:

Office Européen des Brevets
Erhardtstrasse 27
8000 Munich 2, Germany
Tel: (49) 89 23 990
Fax: (49) 89 99 4465

Patent registration in France requires a French address, which may be obtained through a legal representative in France. A list of patent advisors who can act as legal representatives can be obtained from the French Association of Patent Advisors, "Compagnie Nationale des Conseils en Propriété Industrielle":

CNCPI
92, rue d'Amsterdam
75009 Paris
Tel: (33) 1.53.21.90.89
Fax: (33) 1.53.21.95.90

Certificate of Utility Registration:

Certificates of Utility are also granted by INPI (see above). However, in this case, INPI does not conduct a check for comparable inventions.

Fees:

- * Patents for Inventions
 - Application fee: US 41, which includes the first year of annual renewal fees.
 - Documentation and research fee: US 690. This amount is to be paid at the latest one month after the application.
 - The annual renewal fee is calculated each year on a sliding scale.
- * Certificates of Utility
 - Registration fee: US 41
 - Annual renewal fees are calculated on a sliding scale.

Trademarks

Trademark protection can apply to both goods and services. In a general sense, trademarks recognize and protect indicators, which serve to distinguish one product or service from similar products or services. In the French regime, trademarks:

- * Can be written or designed trademarks.
- * Can be sonorous trademarks, such as musical tunes, jingles, words, slogans.
- * Must not be deceptive as to the nature or origin of the goods.
- * Must be recognizable by sight or sound.
- * Must have novelty for the specified product line.

Duration: A trademark has a ten-year life span and is renewable every ten years.

Trademark Registration: Applications must be filed with INPI, which receives applications, examines their validity, and registers trademarks. After registering the trademark, it must be publicly and unequivocally exploited for five consecutive years, or all trademark rights are forfeited. It may be sold totally or partially, by product or service category.

INPI
Division des Marques
32, rue des Trois-Fontanot
92016 Nanterre, France
Tel: (33) 1.53.04.53.04
Fax: (33) 1.49.01.07.37

Registration of trademarks, as in the case of patents, requires a French address, which may be obtained through a legal representative in France. A list of trademark advisors who can act as legal representatives can be obtained from CNCPI, whose address is listed above.

Fees:

* Application fee (first registration or renewal): US 245 for up to three product/service categories; US 50 for each additional category protected.

For designs and models specifically:

- * For each photographic reproduction:
 - in Black and White: US 30
 - in Color: US 60
- * For a renewal: US 35

Designs and Models

Designs and models have the following characteristics:

- * Designs are an assembly of traits or colors on the surface of an object. They constitute an original two dimensional decoration.
- * Models are all creations (ornaments).
- * They must have absolute novelty.

Although some designs and models can be protected under patent or copyright procedures, others fall into a category which requires special treatment. Designs or models having an industrial function follow patent procedures, while designs or models having a purely ornamental function follow copyright procedures. Those designs or models which have both a practical and an ornamental function are subject to the following:

Duration: Infringement protection has a 25 year life span, and is renewable for another 25 years.

Registration: Exclusive proprietary rights to the design or model are acquired through the act of creation itself. Registration merely serves as proof of that creation. Designs and models are to be registered with the INPI:

INPI-Designs and Models Section
26 bis rue de Saint Petersburg
75008 Paris, France
Tel: (33) 1.53.04.53.04
Fax: (33) 1.42.93.59.30

To prove the date of creation of a design or model without formal registration, a designer may wish to use a special envelope (enveloppe speciale) for a US 11 fee. The date of creation begins when the envelope is received by the INPI.

Copyrights

Copyrights cover artistic works, literary works and software. In the French IPR regime, in order to qualify for a copyright, the language used to express

the idea must be original, not the idea itself.

Duration: Copyrights are valid for 50 years after the death of the author, with two major exceptions: music copyrights are valid for seventy years after the death of the composer, and software copyrights are valid for 25 years after creation. Contrary to other copyrights, software designed by a salaried employee belongs to the employer.

Registration: Artistic and literary works are automatically protected once created and fixed in tangible form. Therefore, registration is not required, but nonetheless recommended.

For musical works, including songs, instruments, poems, sketches under 20 minutes, monologues, and other musical audiovisual productions, applications must be filed with the French Society for Musical Authors, Composers and Editors:

Societe des Auteurs, Compositeurs et Editeurs de Musique (SACEM)
225, avenue Charles de Gaulle
92521 Neuilly sur Seine, France
Tel: (33) 1.47.15.47.15
Fax: (33) 1.47.45.12.94

Membership acceptances are restricted to reputable applicants who are already known for the quality of their works. If not qualified for SACEM, applications must be filed with the National Association of Musical Authors and Composers:

Syndicat National des Auteurs et Compositeurs de Musique (SNACM)
80, rue Taibout
75009 Paris, France
Tel: (33) 1.48.74.96.30
Fax: (33) 1.42.81.40.21

For theatrical works, including plays, operas, operettas, musical comedies, films and theatrical scripts, applications must be file with the Society for Theatrical Authors and Composers:

Societe des Auteurs et Compositeurs Dramatiques (SACD)
11 bis, rue Ballu
75442 Paris Cedex 09, France
Tel: (33) 1.40.23.44.44
Fax: (33) 1.45.26.74.28

For literary works and software, applications must be filed with the French Literary Society:
Societe des Gens de Lettres (SGDL)
38, rue du Faubourg Saint-Jacques
75014 Paris, France
Tel: (33) 1.53.10.12.00

Fax: (33) 1.53.10.12.12

For documentary and educational works, applications must be filed with the Civil Society for Multimedia Authors:

Societe Civile des Auteurs Multimedia (SCAM)

5, avenue Velasquez

75008 Paris

France

Tel: (33) 1.56.69.58.58

Fax: (33) 1.56.69.58.59

K. Need for Local Attorney

Establishing an entity to do business in France is not recommended. A lawyer with experience in France should be retained as soon as the establishment of a French business entity is contemplated. The U.S. Commercial Service in Paris maintains a list of American Lawyers practicing in France, which is available upon request. More detailed information about professional backgrounds can be obtained from the Martindale-Hubbell Law Directory and for the Bar Register of Pre-eminent Lawyers. Lawyers and bankers in the United States also will normally be able to recommend lawyers in France.

France has two major categories of legal practitioners:

Avocats An "avocat" must be a lawyer. "Avocats" may render legal advice on all matters, draft agreements and contracts, handle commercial disputes and collection cases, and plead and defend civil and criminal cases before the French courts to which they are admitted.

Notaries (Notaires) A French "notaire" is a public official appointed by the Ministry of Justice, and not the equivalent of a public notary in the United States. The number of "notaires" in each jurisdiction is limited, and their fees fixed by law. Their functions include the preparation and recording of notarial acts (wills, deeds, acts of incorporation, marriage, contracts, etc.), the administration and settlements of estates (excluding litigation in court) and serving as the repository of wills. They are not lawyers, but very specialized members of the legal profession. They may not plead in court.

V. LEADING SECTORS FOR U.S. EXPORT AND INVESTMENT

LIST OF BEST PROSPECTS FOR AGRICULTURAL, INDUSTRY AND SERVICE SECTORS FOR
U.S. EXPORTERS TO FRANCE
(U.S. millions)

A. BEST PROSPECTS FOR NON-AGRICULTURAL GOODS AND SERVICES

Listed below are 16 industry sectors which the U.S. Embassy in France considers "best prospects" for U.S. business; they are ranked by forecast total imports from the U.S.

Rank	TOTAL IMPORTS FROM U.S.	SECTOR SYMBOL NAME
1	6,332	CSF
2	3,800	TRA
3	3,779	EMP
4	2,777	CPT
5	2,297	ELC
6	1,797	SEC
7	1,218	TXT
8	1,029	FRA
9	1,029	AIR
10	1,100	TEL
11	849	LAB
12	692	MED
13	618	POL
14	375	APS
15	354	TES
16	350	AUT

1 - COMPUTER SOFTWARE (CSF)

The French computer software market is expanding rapidly. Demand for software solutions are exploding because the liberalization of telecommunications, the development of Internet E-commerce sites, as well as Intranets among corporations, the rise in the corporate world of Windows-NT solutions, and the challenges represented by the switch to the Euro currency as well as the Y2K issue.

French companies tend to outsource a greater proportion of their software development than other European countries, thus making France the largest software market in Europe, with more than 6,000 software firms. Furthermore, French flagship firms such as Bull (leading hardware manufacturer) and Cap Gemini Sogeti (leading software and services company) have helped to ensure that adequate resources are invested in the software industry. The recent growth of the software industry at the expenses of the hardware industry has also led major hardware companies such as IBM, DEC, BULL and UNISYS to redirect their resources towards the software sector.

The ten largest firms dominating the French market for computer consulting, computer engineering, and systems integration are: 1. Cap Gemini (\$807 million); 2. IBM Global Services (618 million); 3. Bull (\$443 million); 4. Sema Group (\$407 million); 5. Altran (\$401 million); 6. Andersen Consulting (\$392 million); 7. Unilog (\$275 million); 8. GFI Informatique (\$244 million); 9. C&S Communication & Systems (\$221 million); and CSC (\$179 million).

One of the most positive perspectives is that created by the development of Internet E-commerce and Intranet solutions, which will dramatically improve the way people communicate and work together. Only 27% of French organizations are in possession of an Internet site and great opportunities now exist for firms that offer products and services for the creation of Web Sites, Groupware, Videoconferencing, and Electronic Document Processing applications. For example, the French market for Intranet software and services is anticipated to exceed USD 4 billion by the year 2001, which includes USD 1.5 billion for Intranet software and USD 2.8 billion for Intranet services. The companies which are best positioned to take advantage of this opportunity are vendors, software services firms, and systems integrators. However, telecommunication operators are in the process of partenering with software developers in order to take a share of the market.

Seven of the ten largest packaged software firms in France are American. They are:

IBM Software Group(\$678 million); 2. Microsoft (\$562 million); 3. Oracle (\$228 million); 4. Computer Associates (\$117 million); and 5. Parametric Technology (\$61 million). These firms offer a wide range of products, including databases, spreadsheets, CAD/CAM systems and word processing. They also represent the leading providers of Internet/Intranet E-commerce applications.

Demand is anticipated to rise sharply in the following areas:

- Integrated management software
- Telecommunications
- Client-relations software
- Logistics
- Tier-maintenance software

	1997	1998	1999
A. Total Market Size	34,394	38,658	43,915
B. Total Local Production	31,112	35,073	39,919
C. Total Exports	6,691	7,414	8,308
D. Total Imports	9,973	10,999	12,304
E. Total Imports from U.S.	4,892	5,524	6,332
F. Exchange Rate:USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates.
(Figures in US millions)

2 - TRAVEL AND TOURISM (TRA)

International travel and tourism to the United States is America's leading services export, creating a trade surplus of nearly USD 19 billion and injecting USD 91 billion in revenue into the U.S. economy in 1998.

Expenditures by Western European visitors set a record USD 30.2 billion with United Kingdom, France and Italy each setting records for arrivals.

Since 1985, the number of French tourists has more than tripled and has reached 1,013 million in 1998. North America (California, the U.S. National Parks, New York and Florida) remain the top choices among long-haul destinations. In 1997, total travel receipts from France registered in the U.S. represented USD 2,485 million (+7% over 1996 figures) with 978,000 visitors. France ranks Three among the top European international markets after the U.K. and Germany.

With a minimum of 5 weeks of statutory paid vacation per year, 23,7% of the 58.5 million French population traveled abroad in 1997. France outbound travel is highly seasonal. The French are very individualistic in their travel behavior; as a consequence, 21% only will buy travel packages. The average length of stay is approximately 15 nights. The daily visitor spending in the U.S. amounts to approximately USD 103.

Of the 4,000 some travel agents in France, the Visit USA travel trade in France represents about 2,300 retail agents, 50 tour operators and some 80 incentive, business and group specialists, mostly concentrated in Paris and its region (70% of the market). Over the past few years, French tour operators have adapted themselves to the needs of the market and concentrated on products offering plenty of opportunities for personal freedom to explore and satisfy individual interests. They have had to face the change in their distribution system, where Internet plays a more decisive role, as well as the introduction of the e-ticket in the French market. Thus, the French traveler is encouraged to by-pass the travel agents.

The Visit USA Committee/France, with over 100 members, is extremely active in the market reaching the French consumer through the various joint promotional activities, including the opening of an information center for the French consumer, organized with the support of the U.S. Commercial Service.

	1997	1998	1999
A. Total Market Size	89,800	90,380	96,000
B. Total Local Production	101,400	102,000	108,300
C. Total Exports	28,400	29,800	31,500
D. Total Imports	16,800	18,100	19,200
E. Total Imports From U.S.	3,100	3,500	3,800
F. Exchange Rate:	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates. (Figures in US millions)

3 - EMPLOYMENT SERVICES (EMP)

Unemployment has been a major economic problem in France for the past few years. However, the rate has been steadily decreasing since December 1996 to reach 11.4 percent in April 1999. The employment services industry has been enjoying growth rates of approximately 7 percent for both recruitment firms and temporary employment agencies.

Recruitment firms announced 6 percent sales increase for the first quarter of 1999. Most assignments aim to fill commercial/marketing positions (24 percent), far ahead of technical positions (8 percent) and others. Currently, assignments for human resources directors and MIS director positions are in high demand with, respectively, a 75 percent and 57 percent increase since 1998. The services sector (41 percent), followed by the industrial sector (29 percent) lead demand for recruiting services.

France is the largest temporary help market outside the U.S. The temporary employment services industry reached 28 percent sales growth in 1998. It continues to grow. In 1998, the number of temporary help contracts increased by 20 percent. The most frequent users of temporary manpower remain the industrial (54.4 percent) and service sectors (26.6 percent).

Several big companies dominate the French market. ADECCO remains the leader in France and number 2 worldwide after the U.S. company MANPOWER, ranked second in France. Vendior-Bis is the third largest temporary employment services company in the world, and also ranks third in France. Synergie is the fourth largest French temporary help agency. This company hopes to benefit from the mergers in this sector by serving clients who do not wish to work solely with the giants of the industry.

American recruitment firms figure most prominently in executive search, where they represent some 25-30 percent of the market and account for about 40 percent of revenue. Almost all-major U.S. headhunter/recruitment companies are already present in France and enjoy a good reputation.

Access to the French employment services market is relatively easy as there are no trade barriers, and U.S. firms are subject to the same regulations and standards as local firms.

	1997	1998	1999
A. Total Market Size	12,353	15,251	17,996
B. Sales by Domestic Firms	8,646	10,676	12,485
C. Export Sales	1,235	1,525	1,800
D. Sales by Foreign-owned Firms	3,582	2,897	3,532
E. Sales by U.S.-owned Firms	2,224	3,203	3,779
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates.
(Figures in US millions)

4 - COMPUTERS AND PERIPHERALS (CPT)

Estimated at USD 56 billion, the French IT market ranks second in Europe and fourth in the world. Since 1997, this market has experienced a dramatic growth rate of about 10% per year and is now about to catch up with Germany and Northern Europe in the adoption of the latest technologies, including those related to the Internet and E-commerce. This trend has been favored by the following factors:

1. A healthy economic environment with low interest rates and a low inflation rate (around 2%);
2. Investments related to the Y2K problem and the switch to the Euro currency;
3. French corporations catching up with delayed investments in new computer equipment;
4. A shortening of the technological cycles which makes the adoption of new technologies ever faster - four years for client/server systems, eighteen months for the internet, and nine months for Intranets

The combination of technological progress and sharp decreases in the price of machines and software have encouraged a significant rise in demand on the part of both professionals and non-professionals for the latest computer and peripheral technologies.

As with other Western nations, the French are embracing the Internet with enthusiasm. Nearly 9% of French households are already connected to the Net and we anticipate an adoption rate of 150% per year until Year 2002. Internet Service Providers (ISP's) are now offering subscription rates averaging \$10 per month for unlimited use. Some large French retail chains have even started offering free access to the Internet.

Super-markets and large retail chains have created entire sections dedicated to the sale of multimedia PC's, peripherals, CD-ROM titles and DVD's with prices for multimedia PC's ranging between \$800 and \$1500.

The global replacement of proprietary mainframes by open-systems is also creating an increasing demand for servers, workstations and PC's, especially with the penetration of Windows-NT in the corporate world (\$1.2 billion, with an annual growth rate of 27%). Unix-based workstations will nevertheless continue dominating the market for high-range applications, such as CAD/CAM, Videoconferencing, Electronic Document Processing and Groupware.

The five largest suppliers of hardware in France are IBM, Bull, Compaq-Digital, Hewlett-Packard and ICL. Three of these are American. The French PC market grew by 7% in 1998 (\$6.6 billion), primarily in portables. The ten leading computer PC manufacturers in France are Compaq (13%), Hewlett-Packard (9%), IBM (8%), Apple (7%), Packard Bell (6%), Dell (5%), ZDS (4%), Toshiba (4%), Olivetti (3%), SNI (2%). The professional PC market is driven by the sale of servers and portables.

As mentioned previously, distribution channels for PC's and related items are now primarily represented by multi-purpose specialized stores (54 % of the market) and large hyper-market chains (12 % of the market). Dell and Gateway 2000 have also been able to compete effectively with other brands through the establishment of very efficient mail-order networks.

The best prospects for companies seeking to enter the French market include the following products:

- PC's with enhanced CD-ROM/DVD and Internet capabilities
- Video-conferencing equipment
- Electronic document processing equipment
- Flat monitors
- Portable computers including laptops, notebooks, and palmtops
- Ink-jet printers
- High-speed modems
- Wireless LAN communication equipment

	1997	1998	1999
A. Total Market Size	16,664	17,580	18,283
B. Total Local Production	9,931	10,530	11,004
C. Total Exports	813	841	859
D. Total Imports	7,546	7,891	8,138
E. Total Imports from U.S	2,488	2,647	2,777
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates.
(Figures in US millions)

5 - ELECTRONIC COMPONENTS (ELC)

The French electronics industry continues to demonstrate strong growth. With nearly 15% expected growth over the next year, the French market should offer numerous opportunities in the electronic components industry.

The telecom, automotive, consumer, and defense industries have all helped drive the electronics industry.

- French mobile telephone exports grew by 38% over the past year. As a result 18% growth is expected for electronic components used in the mobile telephone industry over the next year.
- Currently, electronic components account for 5% of the content of vehicles manufactured in France. This percentage is expected to increase to 20% within the next 5 years. Estimated growth for the automotive electronics industry should reach 7% this year.
- There is an increased demand for electronic components. Electronic components used in the Smart Card, the French microchip, which is used for all types of consumer transactions, is expected to grow by 20% this year.
- Although the Defense industry has contracted over the past several years, Prime Minister Jospin has announced that France's defense budget will remain constant for the next 4 years. Consequently, outlays for defense electronic procurements should remain constant, and offer a stable market for the electronic components.

	1997	1998	1999
A. Total Market Size:	5,664	6,747	7,759
B. Total Local Production:	6,916	7,815	8,987
C. Total Exports:	6,957	7,861	9,040
D. Total Imports:	5,705	6,446	7,413
E. Total Imports from the US	1,826	2,127	2,297
F. Exchange Rate: USD 1.00 FF 5.75		FF 6.00	FF 6.10
(in USD millions)			

6 - SECURITY AND SAFETY EQUIPMENT (SEC)

Please note that the statistics for security and safety equipment do not include security services (audit, engineering, security guards) technical control and information systems security.

1999 market estimates show a 8 percent growth over 1998. Overall, it is projected to continue at this pace over the next year, with some subsectors particularly buoyant. Overall, the security market should continue presenting good mid and long-term prospects.

Security has become a national issue, mostly due to the continual significant rise in incidents of vandalism, crime, terrorism, theft and computer fraud. As a result, demand for advanced access controls and electronic surveillance equipment (video and telesurveillance) is projected to expand at an annual rate of 6 to 8 percent through the year 2000. Within access controls, after the year 2000, the most promising area will be biometrics, where American companies have the technical leadership. In addition, as information technology develops very rapidly, there is a strong demand for security measures to ensure the constant availability and integrity of information systems. The financial sector, in particular, represents the most mature market for security products such as encryption, identification techniques, and message verification equipment.

It is anticipated that imports from the U.S. will continue to strengthen, as American equipment of advanced technology, renowned for innovation, performance and reliability, exactly match the fastest-growth security segments. Best prospects remain in access controls, particularly in biometrics, electronic article surveillance (EAS) systems and sprinklers.

While continuing numbers of suppliers are entering the market, the security industry has continued to become more concentrated, with increased partnerships/alliances, mergers or acquisitions between suppliers.

	1997	1998	1999
A. Total Market Size	6,440	6,718	7,457
B. Total Local Production	5,200	5,428	5,916
C. Total Exports	1,110	1,130	1,301
D. Total Imports	2,350	2,420	2,842
E. Total Imports from U.S.	1,122	1,420	1,797
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates (figures in USD millions).

7 - TEXTILE (TXT)

In 1998, the French textile industry was made up of 4,500 companies, employing 230,000 persons, for a total sales volume of USD 47,540 million. The industry was divided into three sectors:

- Apparel textiles (74%)
- Technical textiles (16%)
- Household textiles (9%)

The apparel textiles market was valued at USD 28,263 million, and was composed of the following sub-sectors:

- Women's wear, representing 52 percent to reach USD 14,650 million
- Menswear, representing 33 percent to reach USD 9,283 million.
- Childrenswear, representing 15 percent to reach USD 4,330 million.

France's major suppliers of textiles (including apparel, technical and household textiles) are EU countries including Italy (8%), Germany (4%), Belgium/Luxemburg (4%), the United Kingdom (2%), Portugal (2%), and Spain (2%), followed by China, Turkey and Morocco.

However, it is important to note that in the apparel industry, Asian countries hold an important share of the French market, followed by Tunisia and Morocco.

In 1998, American textile imports to Europe represented only 7.2% of total imports. These imports were mainly composed of technical textiles. American chemical and technical textile manufacturers have a strong reputation for technological know-how and a high level of sophistication. In addition, American companies are introducing innovative products (easy-to-use, easy-to-clean, and anti-bacterial textiles) which correspond to the needs of the French consumer. Furthermore, traditional fibers are being progressively replaced by new generations of fibers for new applications (i.e: clothes which are harmless to the environment, stain-resistant clothes, fabrics which moisturize the skin as a result of microencapsulation techniques, etc.).

In light of the above, there appear to be numerous opportunities for U.S. companies to successfully penetrate the French market and to gain market share.

	1997	1998	1999
A. Total Market Size	37,739	37,850	38,228
B. Total Local Production	15,130	14,800	14,948
C. Total Exports	22,260	22,295	22,740
D. Total Imports	29,043	30,164	31,068
E. Total Imports from U.S.	1,452	1,206	1,218
F. Exchange Rate :USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates
(figures in US million)

8 - FRANCHISING (FRA)

The French franchise industry is ranked third in the world and first in Europe. It has been growing steadily over the last several years, at an average annual growth rate of 9 percent. With 530 franchisors and 29,673 franchisees as of January 1, 1999, the French market is estimated at USD 32.1 billion, and accounts for 6% of total retail and service markets.

The main sectors of the industry include the commercial sector, the service sector and the hotel/restaurant sector. Changes in different areas of the French franchise market reveal consumer behavior trends, as well as best market prospects. The service sector currently has the highest recruitment rate. The specific markets showing the most potential are discount/consignment stores, hairdressing stores and candy stores. In the retail sector, traditionally independent shops have been closing to make room for franchise networks. While recently the hotel/restaurant sector has not been performing as well as other sectors, the increasing success of fast food and traditional restaurants is contributing to a revival of this sector. The current popularity of theme restaurants, in particular, demonstrates consumers' preference for a pleasant, slightly unusual restaurant atmosphere.

While French entrepreneurs are increasingly attracted to franchising and look to the U.S. for advanced, profitable, and innovative franchising formulas, French franchise formulas, mainly in the commercial sector, are still dominant in France. In terms of the foreign-owned franchise market, U.S. companies have 52% of total sales. All foreign-owned franchises in France are mainly in the services and hotel/restaurant sectors and were well established in their respective country before entering the French market. U.S. companies possess advantages with their superior know-how of network development, delivery speed, good service and competitive prices. Therefore, they can expect to do well in franchise sectors not yet exploited, as well as in competitive markets when offering a good price/quality ratio.

	1997	1998	1999
A. Total Sales	32,521	32,666	34,300
B. Sales by Domestic Firms	30,645	30,781	32,321
C. Sales by Foreign-Owned Firms	1,876	1,884	1,979
D. Sales by U.S.-Owned Firms	976	980	1,029
E. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates.
(Figures in USD millions)

9 - AIRCRAFT AND PARTS (AIR)

While many parts of the world were directly affected by the Asian and Latin American crisis of 1998, the French aeronautics and space industries recorded a 20.6 percent increase over 1997, marking the fourth consecutive year that orders have exceeded sales. Overall sales provided a 9.1 percent increase to 161.4 Billion Francs. Indicators point to continued overall growth in the industry for 1999 and a stable aeronautic industry in Europe.

France was the first European nation to create a space program - 1961 - and is the premier European power in space, third in the world. The French aeronautic and space industry employs 96,300 people and in 1998 added 1,000 additional employees.

The civil aviation market represents 67 percent of the total aeronautic and space industry and produces 64 percent of the orders. There was a 14.5 percent increase in sales over 1997 for a total of 108.1 billion French francs. An increased demand for civil air and civilian space production contributed to the fifth consecutive year of profit for the civil sector, albeit with tax payer assistance. Exports in the civil market rose 23.2 percent in 1998, largely because of increased export orders for Airbus and Falcon, while the domestic sales market was down slightly, -1.3 percent.

Airbus received 556 orders worth \$39 billion in 1998, which were divided amongst 36 clients. In 1998, 229 airplanes were delivered, a 26 percent increase from 1997. Dassault Falcon Jet is the world leader in business jets and in 1998 sold 99 compared to 74 in 1997. Eurocopter is the No. 1 global manufacturer of helicopter parts, and produces over 40 percent of global production.

As the U.S. aerospace industry experienced significant consolidation and downsizing over the past 10 years, European and French industries have begun a similar process. In 1999 Matra Hautes Technologies merged with Aerospatiale to create the world's fifth largest aerospace and defense company. With the largest industrial base in Europe for both civil and military aerospace, France will continue to be an important competitor and customer for U.S. firms.

	1997	1998	1999
A. Total Market Size	6,622	7,412	8,296
B. Total Local Production	12,431	13,915	15,576
C. Total Exports	7,636	8,548	9,570
D. Total Imports	1,827	2,045	2,289
E. Total Imports from U.S.	822	920	1029,7
F. Exchange rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above figures are unofficial estimates based on information provided by GIFAS, the French Aerospace Association. (figures in USD millions).

10 - TELECOMMUNICATIONS EQUIPMENT (TEL)

With a telephone in 97 percent of French households, France is the world's fifth largest market for telecommunications equipment, after the United States, Japan, Germany, and United Kingdom. The French network uses digital, fiber-optic and terrestrial microwave systems and is generally considered to be one of the most advanced and reliable systems in operation.

As a result of current trends in liberalization and deregulation in the telecommunication market, the equipment telecommunications sector looks to benefit. This sector has been driven by the needs to create an infrastructure that can support France's broadcasting, telephony, and growing multimedia and Internet demands. Future market growth is expected to result as new telecommunication operators invest in infrastructure and equipment, existing operators continue to maintain and reinvest in their systems, and demands for high speed Internet access stimulate a need for new technologies.

Furthermore, France is one of the first EU member states to establish an independent regulatory authority, ART, that has made progress in establishing a pro-competitive regulatory environment.

Through intensified marketing efforts, American companies are finding the French telecommunications equipment market more accessible and filled with potential sales. In addition, American suppliers have a reputation for product reliability, quality, service and price, and thus have strong potential in this sector.

	1997	1998	1999
A. Total Market Size	7,500	8,400	8,800
B. Total Local Production	10,400	11,300	12,400
C. Total Exports	5,700	6,600	7,500
D. Total Imports	2,800	3,700	3,900
E. Total Imports from U.S.	0,500	0,900	1,100
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.00

(Figures in USD millions)

11 - SCIENTIFIC LABORATORY EQUIPMENT (LAB)

The private sector is currently the most dynamic area within the industry and is expected to experience improvements in the future. The following types of products represent best prospects for U.S. manufacturers of scientific laboratory equipment: Environmental and agricultural analytical equipment, pharmaceutical industry equipment and biotechnological equipment.

As France has traditionally placed a strong emphasis on micro-genetics research as a means to developing cures for diseases, a constant need for cutting-edge research tools is always present. New French environmental safety regulations, as well as the need to comply with European legislation, has also influenced demand for scientific laboratory equipment. In addition, stricter European directives are expected to continue to foster growth in the future.

France is one of the leaders in the agriculture and food industry, which alone is valued at USD 134.5 billion. With so much capital at stake, this industry takes extreme measures to guarantee the quality and safety of its products. As such, there has been a tremendous need for diagnostic equipment.

Currently the market for this equipment is valued at USD 50 million. This market has grown at a rate of 10 percent over the last few years, and accelerated growth is forecast for the next several years. Equipment that can conduct either traditional analysis sanctioned by the "AFNOR" (Association Francaise de Normalisation - National Institute for Standards) or alternative/rapid analytical testing is among the products most in demand.

	1997	1998	1999
A. Total Market Size:	2,467	2,566	2,595
B. Total Local Production:	917	954	964
C. Total Exports:	713	741	749
F. Total Imports:	2,263	2,353	2,380
G. Total Imports from the US:	800	832	849
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10
(in USD millions)			

12 - MEDICAL EQUIPMENT (MED)

The French medical sector continues to grow, as it is closely linked with the general population increase and extended life expectancy. The emergence of new technologies, such as same day surgery, has generated a new market for home health care equipment. Approximately 70 percent of all French medical costs are reimbursed, a factor which has led to a widespread tendency to over-consume. Any attempt to control medical costs creates strong opposition from the public, and from all sector professionals. This is in spite of the fact that they would all agree that some savings must occur in order to save the Social Security system.

Since June 1998, as for the rest of Europe, all medical devices sold in France must bear the CE Mark. In France, the medical equipment sector is highly dependent on imports, mainly from the U.S., followed by Germany, Japan and Italy.

	1997	1998	1999
A. Total Market Size	3,666	3,801	3,942
B. Total Local Production	3,340	3,440	3,543
C. Total Exports	1,578	1,657	1,740
D. Total Imports	1,904	2,018	2,139
E. Total Imports from U.S.	640	666	692
F. Exchange Rate : USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates.
(Figures in US million)

13 - ENVIRONMENTAL TECHNOLOGY EQUIPMENT & SERVICES (POL)

The French environmental technologies market is expected to grow by more than 4 % after several years of little growth. However, many sectors within the industry are forecast to experience strong growth over the next few years. This upswing in the market is partly due to an increase in investment by local authorities and postponed environmental projects currently being executed. In addition, most local governments are expected to incur large outlays through 2003 to conform to many European environmental standards scheduled to go into effect in 2002 and 2005.

The quality of air has remained a primary environmental concern for the French. In response to stricter European directives and public demand for cleaner air, new initiatives and laws have been put into place. The 1997 "Quality of Air and Efficient Use of Energy" law and regional programs will create standards that surpass current legislation. Three initiatives, which have been promoted by regional governments; "Regional Plan for the Quality of Air", "Protection of the Atmosphere", and "Plan for Urban Transportation", have addressed France's concern for cleaner air. This should ultimately result in a greater need for air pollution control equipment and services. In particular, measuring and monitoring equipment is expected to grow by 11%, while dust extractors and gas purification systems should experience an increase of 10%.

A greater need for water treatment equipment and services has occurred due to a rise in industrial activity over the past two years. Also, a continued public demand for safe and clean drinking water at affordable prices has motivated the water industry to develop effective water treatment technologies. Market reforms and the French Water Agencies' program should also stimulate the overall demand for products and services related to water treatment. Some sectors within the water industry, such as sewage treatment, industrial wastewaters and sludge treatment and analytical equipment could grow by as much as 60% over the next 5 years.

The waste management sector is currently undergoing change. New initiatives and government legislation encourage sorting, recycling and composting techniques and limit incineration and landfill processes. As France moves away from landfill and incineration techniques and places greater emphasis on sorting, recycling and composting, new market and investment opportunities will appear. Over the last 9 years, recycling of waste has increased from 4% to 10%. Currently, 20% of all glass is recycled. These percentages should continue to grow with future legislation, thus stimulating the demand for new waste management and solid waste treatment services.

	1997	1998	1999
A. Total Market Size:	22,078	23,222	24,151
B. Total Local Production:	25,089	26,092	27,136
C. Total Exports:	8,066	7,527	7,828
H. Total Imports:	4,516	4,957	5,155
I. Total Imports from the US	541	594	618
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

14 - AUTOMOTIVE PARTS AND SERVICE EQUIPMENT (APS)

In 1998, the original equipment market increased 9 % to reach USD 21 billion, driven by a particularly dynamic export market. European Union markets accounted for 85 % of French OEM exports, as vehicle production in E.U. countries increased over the course of 1998. Overall vehicle production throughout Europe is expected to remain at present levels in 1999, or show a slight increase. Domestic automobile production increased 10 % in 1998 to reach 2.8 million units, another strong sign for the OEM market.

Following global trends, OEM suppliers to the major automobile manufacturers are increasingly being required to provide full sub-assemblies, while continuing to cut costs and increase the quality and technology of the product. In order to compete, suppliers are locating production and logistic centers close to assembly plants, within a just-in-time supply logistics. With increasing price pressure in the industry, equipment suppliers are in turn requiring higher quality products at lower cost from the second tier suppliers.

In 1999, the aftermarket continued its decline of 3 to 4 %, largely due to overall improvements in equipment reliability and durability. In addition, ongoing price wars in this sector have contributed to lower total turnover in the aftermarket.

The manufacturer's network represents roughly one third of the aftermarket, as the independant network remains an important force in this area, with a two-thirds market share. Auto centers and hypermarkets have become important players in aftermarket distribution, increasing their respective market shares to 15%.

France represents the third largest import market in Europe for automobile parts. The overall import market increased 12% in 1998, and the first half of 1999 has confirmed this trend. European Union imports account for 85 % of overall imports while U.S. imports have a 3 % share.

	1997	1998	1999
A. Total Market Size	29,152	30,555	31,350
B. Total Local Production	30,340	31,975	34,000
C. Total Exports	8,960	10,125	12,400
D. Total Imports	7,772	8,705	9,750
E. Imports from U.S.	322	334	375
F. Exchange Rate	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates (USD millions).

15 - TELECOMMUNICATIONS SERVICES (TES)

The global telecommunications market is growing at a rapid rate. Deregulations, privatization, and tariff reductions are expected to produce unprecedented growth in demand for new telecommunications services in France. The pace of deregulation has changed the European telecommunications market. The makeup of this sector has transformed from an overwhelming monopoly to liberalized market.

Mobile telecommunications services in France have developed somewhat slower than in other European countries. However, this trend is now reversing with a rapid increase in service offerings, decrease in tariffs, and increasing competition between the three cellular operators in France. France, Europe's second-largest economy behind Germany, lags behind many European nations in Internet adoption with 7% of the population on-line, compared with 8% in Germany, 15% in the United Kingdom, and 23% in the United States. Yet, Net use is surging, and last year for the first time, more than 1 million PCs were sold. To overcome what may be considered a "late start" for Internet adoption in the nation, France has unveiled a major new set of measures and policy goals to boost electronic commerce.

Across Europe, the major impact of the newly liberalized market is forcing the national operators to conform to a more competitive environment. Telecommunications companies in France are adapting to the new rules by developing new offerings in services for both professional and private use. The competition will become sharper, as the number of new entrants, Cegetel, Worldcom, Bouygues and smaller entities such as Colt Telecom and Omnicom, and others, increases.

France Telecom (the national operator) as well as other telecom companies are joining forces in order to stay competitive. France is positioning itself to take advantage of the rapidly expanding telecom industry. American suppliers are successfully taking advantage of the growing French mobile and Internet sector through niche markets and joint ventures. France's push to keep up with these new technologies, are all factors which will bring more opportunities to American companies.

	1997	1998	1999
A. Total Market Size	34,142	37,351	39,853
B. Total Local Production	31,785	34,640	36,960
C. Total Exports	841	949	1,012
D. Total Imports	3,198	3,660	3,995
E. Total Imports from U.S.	253	315	354
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

(Figures in US millions)

16 - AUTOMOBILES AND LIGHT TRUCKS (AUT)

The French automobile market is the fourth largest in Europe behind Germany, Italy, and the U.K. Yearly registrations average 2 million new vehicles, and currently, an estimated 26 million private automobiles are in circulation, with an additional 5 million light utility vehicles.

In 1998, the market recovered from the perverse effects of the ending of government scrapping schemes, as new registrations increased 14% to nearly 1.94 million. The first half of 1999 has confirmed this upward trend, as new car registrations continue to increase at this rate - largely the result of an upswing in overall economic indicators and car park renewal. The French Automobile Manufacturer's Association (CCFA) has revised their estimates upward, foreseeing 2 million plus registrations for 1999.

The two major French automobile manufacturers Peugeot-Citroen (PSA) and Renault account for 58% of new car registrations in France. Renault and PSA's market share has increased faster than the market, as both have re-designed popular mid-to small- size models. The U.S. automakers have roughly a 16% share of the French market, with Ford at 8.3% and General Motors 6.5% in 1999.

A noteworthy trend indicates an overall consolidation in the automobile distribution network, with many analysts expecting the number of dealerships to decrease three-fold. Existing dealerships will consequently become much larger, serving wider sales areas.

	1997	1998	1999
A. Total Market Size	59,288	61,659	63,800
B. Total Local Production	65,881	68,516	71,300
C. Total Exports	28,352	29,486	31,500
D. Total Imports	21,758	22,628	24,000
E. Imports from U.S.	322	334	350
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

The above statistics are unofficial estimates (USD millions).

B. BEST PROSPECTS FOR AGRICULTURAL PRODUCTS

New market opportunities (or current opportunities which need to be heavily targeted) for high value products in France for U.S. agricultural exporters exist in a number of areas: fruit juices and soft drinks (including flavored spring waters), dried fruits and nuts, fresh fruits and vegetables (particularly tropical and exotic), frozen foods (both ready-to-eat meals and specialty products such as pizza and ice cream), snack foods, tree nuts, "ethnic" products featuring distinctive themes and flavors such as Tex-Mex, Cajun or California-style cuisine, seafood (particularly salmon), innovative dietetic and health products, organic products, soups, breakfast cereals and pet foods. In addition, niche markets exist in France for candies, chocolate bars, wild rice and kosher foods which showed a rising demand since 1980.

Market opportunities for U.S. exporters also exist for oilseeds, protein meals and other feeds, as well as for wood products and grains.

Listed below are ten agricultural sectors which the Office of Agricultural Affairs considers "best prospects" for U.S. business (figures in USD millions for CY 1998):

RANK	TOTAL IMPORTS FROM U.S.	SECTOR SYMBOL NAME
-	138	OILSEEDS & SEEDS
-	118	FRESH & DRIED FRUITS; INCLUDING NUTS
-	115	PROTEIN MEALS & OTHER FEEDS
-	107	FISH & SEAFOOD, FRESH OR FROZEN
-	86	WOOD
-	81	PROCESSED FRUITS & VEGETABLES, INCLUDING FRUIT JUICES
-	68	GRAINS
-	43	BEVERAGES, INCLUDING MINERAL WATER, BEER, WINE & SPIRITS
-	29	MEAT & OFFAL
-	29	FRESH AND DRIED VEGETABLES

Rank: n/a

Name of Sector: **OILSEEDS AND SEEDS**

HS Code: 12

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	1,092	1,111	1,166
B. Local Production	1,746	1,798	1,887
C. Total Exports	1,298	1,363	1,431
D. Total Imports	644	676	710
E. Total Imports from U.S.	138	152	157
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **FRESH AND DRIED FRUITS, INCLUDING NUTS**

HS Codes: 08

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	3,870	3,826	3,778
B. Total Local Production	2,757	2,771	2,785
C. Total Exports	1,424	1,495	1,570
D. Total Imports	2,537	2,550	2,563
E. Total Imports from U.S.	118	128	132
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **PROTEIN MEALS AND OTHER FEEDS**

HS Code: 23

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	11,503	12,103	12,163
B. Total Local Production	11,286	11,885	11,944
C. Total Exports	1,298	1,304	1,310
D. Total Imports	1,515	1,522	1,529
E. Total Imports from U.S.	115	121	127
F. Exchange Rate: USD 1.00	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **FISH & SEAFOOD, FRESH OR FROZEN**

HS Code: 03

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	2,750	2,809	2,870
B. Total Local Production	1,015	1,066	1,119
C. Total Exports	903	908	913
D. Total Imports	2,638	2,651	2,664
E. Total Imports from U.S.	107	110	113
F. Exchange Rate	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **WOOD**

HS Codes: 44

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	N/A	N/A	N/A
B. Total Local Production	N/A	N/A	N/A
C. Total Exports	2,108	2,118	2,128
D. Total Imports	1,741	1,750	1,759
E. Total Imports from U.S.	86	92	95
F. Exchange Rate	FF 5.75	FF 6.00	FF 6.10

N/A = Not Available

Rank: n/a

Name of Sector: **PROCESSED FRUITS AND VEGETABLES, INCLUDING FRUIT JUICES**

HS Codes: 20

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	6,276	6,307	6,338
B. Total Local Production	5,499	5,526	5,553
C. Total Exports	982	987	992
D. Total Imports	1,759	1,768	1,777
E. Total Imports from U.S.	81	85	89
F. Exchange Rate	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **GRAINS**

HS Code: 10

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	4,277	4,298	4,320
B. Total Local Production	7,907	7,946	7,986
C. Total Exports	4,072	4,092	4,112
D. Total Imports	442	444	446
E. Total Imports from U.S.	68	70	72
F. Exchange Rate	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **BEVERAGES, INCLUDING MINERAL WATER, BEER, WINE & SPIRITS**

HS Codes: 22.01 to 22.06 and 22.07 + 22.08

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	8,928	9,053	9,178
B. Total Local Production	16,156	16,237	16,318
C. Total Exports	9,000	9,045	9,090
D. Total Imports	1,772	1,861	1,950
E. Total Imports from U.S.	43	44	46
F. Exchange Rate	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **MEAT AND OFFAL**

HS Code: 02

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	5,534	5,561	5,588
B. Local Production	6,030	6,060	6,090
C. Total Exports	3,368	3,385	3,402
D. Total Imports	2,872	2,886	2,900
E. Total Imports from U.S.	29	38	46
F. Exchange Rate:	FF 5.75	FF 6.00	FF 6.10

Rank: n/a

Name of Sector: **FRESH AND DRIED VEGETABLES**

HS Code: 07

	1998 (Jan-Dec)	1999 (P)	2000 (F)
A. Total Market Size	3,375	3,391	3,407
B. Total Local Production	3,216	3,232	3,248
C. Total Exports	1,340	1,347	1,354
D. Total Imports	1,499	1,506	1,513
E. Total Imports from U.S.	29	38	46
F. Exchange Rate	FF 5.75	FF 6.00	FF 6.10

(P) = Preliminary

(F) = Forecast

Source: French Customs/SCEES - French Ministry of Agriculture

VI. TRADE REGULATIONS AND STANDARDS

A. Tariffs and Import Taxes

The member states of the European Union have established a Community Integrated Tariff (TARIC) system, under which duties are applied to imports from non-EU countries. TARIC was established by the 1958 Treaty of Rome as part of the European Economic Community (EEC).

The duties levied on imports from non-EU countries, including the United States, are moderate. Most raw materials enter duty-free or at low rates, while most manufactured goods are subject to rates of between 5 and 17 percent. Most agricultural product imports are covered by the Common Agricultural Policy (CAP), under which many items are subject to variable levies designed to equalize the prices of imported commodities with those produced in the EU.

France and other EU member states extend varying preferential tariff treatment to imports from the African, Caribbean and Pacific developing countries (under the Lomé Conventions), several French and Dutch territories and departments, Turkey, Egypt, Morocco, Tunisia, Algeria, Israel, Malta, Cyprus, Jordan, Lebanon and Syria. Tariff preferences are also extended to over 100 developing countries under the Generalized System of Preferences (GSP).

To export consumer-ready food products to France, a U.S. exporter should consider market access restrictions and food laws. Most processed products entering the European Union and France are subject to additional import charges based on the percentage of sugar, milk fat, milk protein and starch in the product. These additional import charges may make certain imported processed products non-competitive in the European market, vis-a-vis similar products produced in the EU. The situation should improve over the next few years because these charges will be converted to fixed tariff equivalents and reduced under the World Trade Organization. Interested U.S. exporters should contact the Office of Agricultural Affairs for up-to-date information on this issue.

The EU tariff schedule is based on the Customs Cooperation Council Nomenclature (CCCN), also referred to as the Harmonized System. This system was introduced to provide a standard tariff classification regime for all products imported and exported throughout the world.

B. Trade Barriers

U.S. companies sometimes complain of France's complex technical standards and of unduly long testing procedures. Testing requirements (usually done in France) and standards sometimes appear to exceed reasonable requirement levels needed to assure proper performance and safety. Most of the complaints have involved electronics, telecommunications equipment and agriculture phytosanitary standards.

The 1989 EU Broadcast Directive requiring a "majority proportion" of programming to be of European origin was incorporated into French legislation

on January 21, 1992. France, however, specifies a percentage of European programming (60 percent) and French programming (40 percent). These broadcast quotas were approved by the EU Commission and became effective on July 1, 1992. They are less stringent than France's previous quota provisions which required that 60 percent of all broadcasts be of EU origin and that 50 percent be originally produced in French. The 60 percent European/40 percent French quotas are applicable throughout the day, as well as during prime time slots. The prime time rules go beyond the requirements of the EU Broadcast Directive and will limit the access of U.S. programs to the French market. Nevertheless, the market share of U.S. films and television shows remains high.

The French government has recently revised its legal services system. Non-EU lawyers may no longer practice as legal consultants and are required to qualify as "avocats," on the basis of full-fledged membership in the French bar. Under the implementing legislation which went into effect on January 29, 1993, this means that non-EU lawyers will have to pass either a "short-form" exam or the full French bar exam. Non-EU lawyers will qualify for a "short-form" exam provided they are able to prove that the foreign state or territorial unit in which they practice allows French lawyers to practice law "under the same conditions." Failing that, they will have to take the full French bar exam. Due to EU regulations, France is required to recognize law degrees for EU nationals but not third country nationals. Nevertheless, non-French EU lawyers, who are also required to qualify as "avocats", may do so via exams less stringent than those for non-EU lawyers. Meaningful access will now hinge on how implementing regulations are administered, including the interpretation of what is meant by granting access on a 'reciprocal basis' and the nature of the exam to be imposed on the non-EU lawyers.

C. Customs Valuation

Import duties are calculated on an ad valorem basis, i.e. expressed as a percentage of the value of the imported goods. This dutiable value is the "transaction value" plus freight, insurance, commissions, and all other charges and expenses incidental to the sale and delivery of the goods to the point of entry into EU customs territory. The invoice price will normally be accepted as the transaction value if the seller and the buyer are not related.

Under Article VII of the General Agreement on Tariffs and Trade (GATT), there are four additional methods for the determination of customs valuation in the event that the method described above is rejected by customs authorities.

These methods are to be applied in the following order: (1) the transaction value of incidental goods; (2) the transaction value of similar goods; (3) the deduction method, i.e. the resale price, less such costs as customs duties, taxes and commissions; and (4) the computed value, utilizing costs of production, profit, and other expenses.

D. Internal Taxes

In addition to the duties levied under the Common External Tariff, goods imported into France are also subject to a Value-Added Tax (VAT). Currently, the VAT in France is generally charged at one of two rates:

- the standard rate of 20.6 percent
- the reduced rate of 5.5 percent, applicable mostly to agricultural products and foodstuffs, original artworks and certain medicines.

VAT must be added to the price of all goods and services sold in France in connection with an industrial or commercial activity. The supplier of any good or service bills his customer at his selling price, plus the amount of VAT at the applicable rate. The supplier collects the full amount, subtracts his own VAT expenditures from the total amount of VAT collected, and periodically pays over the difference to the tax authorities.

E. Export Controls

France cooperates with her trading partners, including the U.S., to control the export of products and technologies with potentially strategic applications. There are no restrictions or regulations on the export of merchandise from France, with the exception of strategic products (including arms and dual-use technologies) and antiques. Before exporting these items, special license must be obtained from customs officials to insure that the objects being exported are not a part of the national heritage of France.

Information on U.S. export controls is available from:

Office of Export Administration
U.S. Department of Commerce
Washington, DC 22030
Tel: (202) 482-4811
Fax: (202) 482-3617
For overseas companies: Tel. (202) 482-2547
Email: www.bxa.doc.gov

F. Import/Export Documentation

Import and export transactions exceeding FRF 250,000 in value must be conducted through an approved banking intermediary. Goods must be imported/exported no later than six months after all financial and customs arrangements have been completed.

For products originating in countries other than EU member states or participants in the World Trade Organization (WTO), and for a limited number of products considered to be sensitive, a specific import/export license may be required by product or by category of products. Otherwise, the following documents are required to import into France:

Shipping Documents. The documents generally required by France on all sea and air shipments from the United States include the commercial invoice, the bill of landing or air waybill, and a certificate of origin.

Commercial Invoice. As in a domestic transaction, the commercial invoice is a bill for the goods from the buyer to the seller. No special form of commercial invoice is prescribed; the firm's letterhead may be used. The invoice should contain the following details both in English and French:

- Names and addresses of seller and buyer.
- Place and date the invoice was prepared.
- Method of shipment.
- Number, kind and markings of the packages and their numerical order.
- Exact description of the goods-customary commercial description according to kind, quality, grade, etc., with special emphasis on factors increasing or decreasing their value.
- Quantity of goods, expressed in units customary in international trade.
- Agreed price of the goods (unit cost, total cost, including shipping and insurance charges, as well as other expenses charged to the costs of the goods).
- Delivery and payment terms.
- Although not a requirement, it is advisable to have the signature of a responsible official of the exporting firm on each invoice.

Bill of Landing or Air Waybill. This is a contract between the owner of the goods and the carrier. Either a straight or negotiable bill of landing is acceptable. No consular formalities are required and shipments may be made freight collect.

Certificate of Origin. This document certifies that the goods entering French territory are made in the United States, and thus are subject to the duties, taxes and restrictions that apply to U.S. goods. Although certificates of origin are not expressly required for all imports into France, they are strongly recommended. If a shipment is not accompanied by a certificate of origin, it may be held up by customs. French authorities accept certificates of origin certified by local U.S. Chambers of Commerce.

Other Documents. Information on documents required for exportation to France of agricultural products (including food items), plants and animals is available from the Foreign Agricultural Service of the Department of Agriculture. Owing to the complexities of these regulations, U.S. exporters should also obtain information directly from the importer prior to shipment.

For information on duties, taxes, and documentation, contact one of the following two offices:

Office of European Community Affairs
U.S. Department of Commerce
14th & Constitution, Rm. 3314
Washington, D.C. 20230
Tel: (202) 482-5276
Fax: (202) 482-2897
Email: tic@ita.doc.gov

Centre de Renseignements des Douanes
84 Rue d'Hauteville

75010 Paris
France
Tel: (33) 1.53.24.68.24
Fax: (33) 1.53.24.68.30
Email: dgdddicrt01@calva.net

G. Temporary Entry

Samples and Carnets. Samples of no commercial value enter France free of duties and taxes. When sending such samples parcel post, the sender must specify what type of samples are being shipped. "No commercial value" should be written on the appropriate shipping documents.

In order for samples of commercial value to enter France duty- and tax-free, a bond or deposit of the total amount of duties and taxes must be arranged. Samples must be reexported within one year if the deposit is to be recouped. An alternative to placing such a deposit is applying for an ATA Carnet.

ATA Carnet. An ATA carnet is a special international customs document designed to simplify and streamline customs entry procedures for merchandise into participation countries for up to one year. The initials "ATA" are an abbreviation of the French and English words "Admission Temporaire/Temporary Admission." Customs authorities in the United States and France accept carnets as a guarantee that all customs duties and excise taxes will be paid if any of the items covered by the carnet are not reexported within the time period allowed. Carnets may be used for commercial samples, professional equipment, and goods destined for exhibitions and fairs.

To inquire about or apply for an ATA Carnet, contact the U.S. Council for International Business:

USCIB
1212 Avenue of The Americas
New York, NY 10036
Tel: (212) 354-4480
Fax: (212) 575-0327
Email: www.uscib.org

H. Labeling and Marking Requirements

Labeling must provide consumers with precise information which answers six basic questions about the product:

- What is it?

- What is it used for?
- What is it made of?
- What does it cost?
- How is it used?
- When should it be used?

As labeling is strictly controlled in France, the answers are found in many regulatory texts.

U.S. firms entering the French market are strongly advised to examine EU as well as French laws. Each European Union country is integrating the rulings of the EU into its national legislation. As much legislation regarding labeling is still in the developmental stage, EU labeling regulations and standards need to be carefully monitored.

For agricultural products, the Office of Agricultural Affairs has an up-to-date extensive listing of labeling and packaging regulations and requirements on a product by product basis.

Labeling in France serves an increasingly informational and even promotional role. Labels often act as "silent salespeople," especially due to the recent growth of large retail stores offering little sales assistance.

Basic Labeling Requirements. Though many labeling regulations are sector related, the following information is generally required for all categories of products:

Language: Labels must be written in French. Any foreign words or abbreviations must have been authorized by French or international law. The writing must be clear and non-promotional.

Designation: State what the product is. For example: "olive oil."

Brand Names/Trademarks: Any names, symbols and marks relating to the product must be found on the exterior of the packaging, the product label, and the bottle-top or lid, as the case applies. Registered brand names and trademarks can only be used by the manufacturer.

Composition: All ingredients or materials constituting the product must be listed.

Usage Instructions: Explain how the product is to be used.

Required Dates: These include when the product was made, the consumption limit for perishable items, and recommended "use by" date for pre-packaged and frozen food products.

Qualifiers: For example: "made by hand" on leather goods.

Name/Address of Manufacturer or Vendor

Specifications: Labels must inform the consumer of any particular product limitations or sales conditions.

Price: The price (including all taxes) must be marked on all pre-packaged goods, unless they are sold by mail order.

Bar Code Price Labeling (GENCOD): Stores are increasingly using this system to speed up the passage of clients at cash registers. GENCOD, France's bar code price labeling system, is generally used for products with a low per-unit value and rapid turnover, as well as for food and non-food products requiring an individual price marking because of their value, nature, or presentation.

Quality and Ecological Labels. More established quality seals and labels exist in France than in any other European country. Though desirable because they offer extra information to the customer, they are not mandatory.

Quality Labels: There are two types of French quality certificates:

- Certificates issued by professional associations; each must be contacted individually for more information. For a list of professional associations, contact the Conseil National du Patronat Français (CNPF):

CNPF

31, avenue Pierre-1er-de-Serbie

75784 Paris Cedex 16

France

Tel: (33) 1.40.69.44.44

Fax: (33) 1.47.23.47.32

Email: www.medef.fr

- Certificates issued by AFNOR, which controls the coveted and highly regarded French "NF" Mark. This quality seal certifies that a product complies with all applicable French standards.

Environmental Labels: AFNOR also issues the "NF Environment" label, which certifies that a specific product meets the environmental criteria to qualify for an NF mark. This label is only available for a limited number of goods, as it is still in the early stages of development. Currently, an "NF Environment" label can be issued for paints, lubricants, trash bags, household chemicals, heating equipment, cosmetics, insulating materials and papers.

The member states of the European Union are currently developing a European Ecolabel, which would certify products as environmentally friendly across the EU. AFNOR is the issuer of the Ecolabel for products manufactured in, first marketed in, or imported to France. An Ecolabel can already be issued for washing machines and dishwashers. There are a further twenty-five products for which certification criteria are currently being drawn up by member states.

For information on the "NF" and the "NF Environment" marks, contact AFNOR directly. (See section J)

I. Prohibited Imports

While not traditionally considered to be a "closed market", certain regulations exist in both France and the EU which limit the market access for specific U.S. agricultural exports. The ongoing harmonization of EU import regulations will hopefully result in the revocation of several French regulations that currently

prohibit the importation of some agricultural and food products. Products which are subject to restrictive regulations include: poultry meat, enriched flour, genetic material, "exotic meats" such as alligator and buffalo, crayfish, and certain fruits and vegetables which are subject to seasonal price restrictions. Other fruits such as pineapples and bananas are subject to import certificates. Fresh vegetables such as artichokes, cucumbers, eggplants, tomatoes, lettuce, and squash are also subject to seasonal price restrictions.

J. Standards

U.S. exporters should note that all goods entering France should conform to French and European Union standards. This is mandatory for all products satisfying publicly-funded contracts, as well as for all machinery, tools, household appliances, sporting equipment, toys, etc. Conformity is generally optional for other goods satisfying private contracts. Products which meet French and EU standards have increased marketability.

These standards often differ substantially from those in the U.S. In many cases, particularly with goods of a technologically complex or potentially harmful nature, rigorous testing and approval procedures must be undertaken before the goods in question can be sold in France. Although one of the goals of the European Union is to harmonize standards across the twelve EU member states, many of these EU standards remain in the developmental stage. Where an EU standard does not currently exist, French standards apply.

United States companies often complain of France's complex standards and of unduly long testing procedures. Testing requirements sometimes appear to exceed reasonable requirement levels needed to ensure proper performance and safety. Most of the complaints have involved electronics, telecommunications equipment, medical/veterinary equipment, and agricultural phytosanitary products.

Mutual Recognition Agreements covering the testing and certification of specified regulated products have been proposed to permit U.S. companies to obtain product certification in the United States which will be recognized by the EU members. Such recognition will enable U.S. firms to market their products throughout the EU and could eliminate the expense of multiple testing and certification procedures. However, certain regulated products covered by MRA's may still be required to have some testing or evaluation done in Europe. MRA's have been proposed in the following sectors: telecommunications terminal equipment, medical devices, pressure equipment and simple pressure vessels, personal protective equipment, visual display units, construction projects, lawn mower noise, recreational craft, equipment for use in explosive atmospheres, and measuring devices.

The Association Française de Normalisation (AFNOR) is the French authority in charge of coordinating the establishment of standards. AFNOR prepares new and revised standards, subjects them to public enquiry, and finally submits them to the relevant ministry for approval. Copies of the most up-to-date standards can be obtained directly from AFNOR:

AFNOR
Tour Europe
92049 Paris La Defense Cedex
France
Tel: (33) 1.42.91.55.55
Fax: (33) 1.42.91.56.56
Email: www.afnor.fr

Information on standards may also be requested from:

American National Standards Institute
11 West 42nd Street, 13th Floor
New York, NY 10036
Tel: (212) 642-4900
Fax: (212) 302-1286
Email: info@ansi.org

National Institute of Standards and Technology (NIST)
National Center for Standards and Certification Information
U.S. Department of Commerce
Building 820, Rm. 164
Gaithersburg, MD 20899
Tel: (301) 975-4040
Fax: (301) 926-1559
Email: www.nist.gov

EU Hotline (on draft standards of the CEN, CENELEC, and ETSI).
Tel: (301) 921-4164

Underwriters Laboratories, Inc. can assist U.S. exporters in understanding and complying with French and EU standards. UL is authorized by the French government to test and certify electrical equipment:

Underwriters Laboratories
International Compliance Services Department
1285 Walt Whitman Road
Melville, NY 11747
Tel: (516) 271-6200
Fax: (516) 271-8259
Email: www.ul.com

Standards and testing for medical devices:

Commission National d'Homologation (CNH)
1, place de Fontenoy
75350 Paris 07
France
Tel: (33) 1.40.56.47.56
Fax: (33) 1.40.56.50.89

Laboratoire National d'Essais
1, rue Gaston Boissier
75015 Paris
France
Tel: (33) 1.40.43.37.00
Fax: (33) 1.40.43.37.37
Email: www.lne.fr

Questions regarding standards and certification of machinery, heavy equipment, and plant facilities should be directed to U.S. the office of APAVE, the primary French technical inspection organization:

APAVE
American European Services, Inc.
Suite 120 1054 31st Street, NW
Washington, DC 20007

Standards - ISO 9000 Certification

The AFNOR (Association Française de Normalisation) coordinates work and research relating to standardization in France. AFNOR prepares new and revised standards, subjects them to public inquiry, and then submits them to the relevant ministry for approval. It is the French branch of the European Standardization System (CEN) and a member of the International Organization for Standardization (ISO). Following EU harmonization policy, the official French standards or "Normes Françaises" (NF) are now in line with those of ISO 9000. In France, compliance with national standards is mandatory for only 5% of the cases. These are for the most part safety and health standards on the product itself. However, one must bear in mind that ISO 9000 certifies the company's management organization, not its products. Hence, the ISO 9000 certification will not necessarily fulfill these product-related requirements.

The recognition and use of ISO 9000 in France is expanding at a very fast pace. The ISO 9000 certification is never mandatory, but it increasingly plays a determining role, especially for sub-contracting companies. Contracts between firms now often include a request for quality assurance. In this respect, ISO 9000 is the most widespread and recognized quality management program in France.

A source at AFNOR noted that ISO 9000 has become a great marketing tool in France, sometimes more cost-effective than advertizing. However, its efficiency as a marketing device varies from sector to sector. ISO 9000 is meant to provide quality recognition from firm to firm, rather than from a firm to end-users. For sub-contractors in the public sector or in a heavily competitive field in the private sector, ISO 9000 generally provides added-value. In fields such as those under EH directives (i.e. medical equipment) or subcontracting in the auto-industry, conformity to ISO 9000 is crucial to stay competitive.

The AFAQ (Association Française pour l'Assurance de la Qualité) is the French quality system registrar, which delivers ISO 9000 certifications. The AFAQ has issued approximately 1200 companies with ISO 9000 certifications and it is estimated that about 200 more companies in France have the certification. Requests are now booming, with 3500 being processed by the AFAQ. The certification takes about 6 months to complete. A foreign company with an ISO 9000 certification from abroad simply needs to contact the AFAQ in order to be

certified in France.

The demand for ISO 9000 registration in France, as well as in Europe, comes primarily from the marketplace as a contractual rather than a regulatory requirement. As compliance with the ISO 9000 standards becomes recognized and required by foreign and domestic buyers and used by manufacturers as a competitive marketing tool, the demand for ISO 9000 conformity will increase. It is therefore critical for manufacturers to determine what are their buyers' requirements regarding ISO 9000 compliance.

Useful Addresses:

AFNOR - Association Française de Normalisation
Tour Europe
92049 Paris La Defense Cedex 7
France
Tel: (33) 1.42.91.55.55
Fax: (33) 1.42.91.56.56
Email: www.afnor.fr

AFAQ - Association Française pour l'Assurance de la Qualité
B.P. 40
92225 Bagneux Cedex
France
Tel: (33) 1.46.11.38.50; (33) 1.46.11.37.11
Fax: (33) 1.46.11.37.77
mary.francoise.goubaux@afaq.org

In the United States:

AFAQ, Inc.
Woodfield Executive Center
1101 Perimeter Drive, Suite 450
Schaumburg, IL 60173
Tel: (847) 755-9125
Fax: (847) 330-0707

AES - American European Services
1054 31st Street, NW Ste. 320
Washington, D.C. 20007
Tel: (202) 337-3214
Fax: (202) 337-3709
Email: ascert@aol.com

K. Membership in Free Trade Zone/Warehouse Agreements

As a member of the European Union, France is subject to all European Union Free Trade Arrangements. European Union laws and regulations provide that member states may designate parts of the customs territory of the Community as free trade zones and free warehouses. Information on free trade zones and free warehouses is contained in Title IV, Chapter Three, of Council Regulation (EEC) No. 2913/92 of October 12, 1992, establishing the Community Customs Code, titled, "Free Zones and Free Warehouses" (Articles 166 through 182).

Article 166 states that free zones and free warehouses are part of the customs territory of the Community or premises situated in that territory and separated from the rest of it in which:

- Community goods are considered, for the purposes of import duties and commercial policy import measures, as not being on Community customs territory, provided they are not released for free circulation or placed under another customs procedure or used or consumed under conditions other than those provided for in customs regulations;

- Community goods for which such provision is made under Community legislation governing specific fields qualify, by virtue of being placed in a free zone or free warehouse, for measures normally attaching to the export of goods.

Articles 167-182 details the customs control procedures, how goods are placed in or removed from free zones and free warehouses and their operation.

The use of free trade zones vary from member state to member state. In France, the process of applying for the status of a free trade zone or free warehouse is administered by the Ministry of Economy/Budget at the following address:

Ministry of Economy/Finance
139, rue de Bercy
75572 Paris Cedex 12
France
Tel: (33) 1.53.18.93.14
Fax: (33) 1.53.18.96.03
Email: www.finances.gouv.fr

VII: INVESTMENT CLIMATE

A. FRENCH INVESTMENT REGIME

Ensuring that France's investment climate is attractive to foreign investors is a priority for French government officials, who see foreign investment as a way to create jobs and stimulate growth. Investment regulations are simple, and a range of financial incentives to foreign investors is available. The investment promotion agency, DATAR, provides active and extensive assistance to potential investors both in France and through agencies around the world. Foreign investors say they are attracted to France by its skilled labor force, central location in Europe, and good infrastructure. However, despite a decade or more of economic reforms and liberalizations, U.S. and foreign companies often say they find relatively high payroll and income taxes, pervasive regulation of labor and products markets, and sometimes negative attitudes toward foreign investors to be disincentives to investing in France.

Foreign investment represents a significant percentage of production in many sectors. Foreign investment has been growing at a rate considerably higher than that of the economy as a whole, and U.S. investment has been growing at a rate faster than total foreign investment. Using Bank of France balance of payments data based on the historical book value of investment, the United States is the largest foreign investor in France, with U.S. firms representing over 19 percent of the stock of foreign investment. However, using the book value instead of the market value of investments tends to underestimate the value of U.S. investments in France. This is because investments by U.S. companies tends to be considerably older than other countries' investments and because U.S. firms often finance expansions and acquisitions on domestic French capital markets or through subsidiaries in third countries. Thus, much U.S. investment in France is not recorded in balance of payments statistics, even though it is ultimately controlled by U.S. citizens.

Correcting for these statistical biases, the market value of the stock of U.S. investment in France may be as much as double the \$47 billion book value for 1997 reported in U.S. Department of Commerce data (www.bea.doc.gov/bea/dil.htm). U.S. data also report that in 1996, over 1,200 affiliates of U.S. firms employed over 450,000 people in France and had net sales of \$135 million.

A1. Openness to Foreign Investment

The Formal Investment Regime

The formal French investment regime is among the world's least restrictive. There is no generalized screening of foreign investment. Only acquisitions, irrespective of size or the nationality of the investors, involving the health sector, public order or the national security of France are subject to a one-month official review. Nevertheless, there are certain sectorally based foreign investment restrictions that in practice tend to favor investors from other EU countries. France has notified to the OECD restrictions in the following sectors (more details can be found in OECD reports, including the April 1996 Review of Foreign Direct Investment in France. The OECD internet address is www.OECD.org):

Agriculture
Aircraft Production
Air Transport
Atomic Energy
Audiovisual
Banking/Financial Services/Accounting Services
Defense Industry
Insurance
Maritime Transportation
Publishing
Radio and Television
Road Transportation
Telecommunications
Tourism

In applying sectoral restrictions, French authorities look to the place of residence rather than to the nationality, of a potential investor. The place of residence of a corporate investor is determined by the place of residence of its ultimate beneficial owners, without regard to place of incorporation. Firms established or incorporated in other EU countries, but owned or controlled by American residents, have therefore been deemed to be non-EU residents. On the other hand, firms owned or controlled by American citizens legally resident in an EU country are considered to be EU residents. For publicly traded entities, a firm is considered not to be an EU resident if a physical person, or group of persons acting together, who are not EU residents own more than 20 percent of a firm's capital. Non-publicly traded entities are considered to be non-EU residents if a physical person or group of persons who are not EU residents ultimately own or control more than 33.3 percent of a firm's capital, unless physical persons who are EU residents also own more than 50 percent of the firm's capital.

However, for publicly and non-publicly traded firms, the French government retains the authority to declare that a firm is controlled by non-EU investors, even if the share of capital held by non-EU investors falls short of the thresholds noted above. To determine if non-EU investors control a firm, the French government may look at, among other factors, the residency of members of the board of directors, and the ability of non-EU investors to veto key management decisions or commercial ties (such as loans, guarantees, options, licenses or contracts) if these factors effectively make the French company dependent on foreign investors. Firms with questions about their residency status should contact the Office of Foreign Investments at the following address:

Service des Financements et Participations
Direction du Trésor
139, rue de Bercy
75012 Paris, France
Tel: (33-1) 44.87.72.43

The website of the Paris Chamber of Commerce and Industry provides detailed English summaries of regulations covering direct foreign investment:
www.CCIP.fr/uk/etudes/invdir.htm.

Informal Impediments to Foreign Investors

France's participation in Economic and Monetary Union (EMU) has increased the competitive pressures on France to improve its domestic business and investment climate in order to promote growth and create new jobs. In addition, France has responded to a more competitive international investment climate by implementing market-oriented economic reforms that increase the attractiveness of the French economy to foreign investors and by offering a variety of investment incentives. Foreign investors also say they are attracted to France by its central location in Europe, highly skilled labor force, and good infrastructure (although France lags behind the U.S. and some other European countries in personal computer use and internet access).

Yet, while today's foreign investors face far less interference than was once the case, over a decade of reforms has not entirely overcome a traditional preference for national control of business and a sometimes reflexive opposition to foreign investment. In some cases, this can be seen in labor organizations' opposition to acquisitions of French businesses by U.S. firms, often reflecting a perception that U.S. firms focus on short-term profits at the expense of employment. In other cases, French firms have stated a preference for working with French and European, rather than U.S., firms. A degree of opaqueness in the privatization process (see below) can also aggravate suspicions about the equal treatment of foreign investors in publicly-held firms.

In addition, deregulation is far from complete and the state remains very involved in economic life. There is extensive regulation of business and labor markets and business taxation rates are high compared to other leading industrial countries. Foreign investors most often cite unnecessary labor regulation and high income and payroll taxes as the greatest disincentive to investing in France. In the case of labor market regulation, the impact on companies of the transition to a 35-hour legal workweek (beginning in 2000 for firms with over 20 employees and by 2002 for other firms) is so far unclear. Key elements of this transition, such as the rate of overtime pay and the impact on the minimum wage system, remain to be worked out in a process of negotiation between firms and labor organizations that should be concluded by the end of 1999.

A specific tax burden faced by U.S. investors is the treatment by French authorities of two social security taxes, the "Contribution Sociale Generalisée" (CSG) and the "Contribution au Remboursement de la Dette Sociale" (CRDS), as income taxes rather than social security contributions. The French government has thus far been unwilling to consider these taxes as subject to the provisions of the bilateral social security totalization agreement between the United States and France, under which U.S. contributors to the U.S. Social Security System would be exempt from paying them. Therefore, companies and employees effectively contribute to the financing of two social security systems. Since companies often compensate foreign workers for the extra tax burdens of working abroad, the result can be considerably higher costs for employing highly skilled expatriate workers, notably to work in headquarters operations in France.

An English summary of tax regulations applicable to foreign companies in France is available at the Paris Chamber of Commerce and Industries' website:
www.CCIP.fr/uk/etudes/fisapp.htm.

France's Privatization Program

The current government that took office in July 1997 has restarted a process of privatization and opening of government controlled firms to private investment that had been essentially stalled since 1993. The current policy is that sales of government holdings will be allowed when in the national interest or the competitive interest of the specific firm. Since 1997, the government has returned to the private sector all or parts of its stakes in France Télécom, Air France, Aerospatiale, and a number of other large companies, banks and insurance groups. The privatization of Crédit Lyonnais, a major retail bank, should be concluded in 1999. U.S. firms have shown an interest in some of these sales. France Télécom shares are quoted on the New York Stock Exchange.

Sales of government interests are conducted either through market-based public offerings or, more often, through an off-market bidding process. In both cases, key decisions are made by the Ministry of Economy, Finance and Industry on the advice of the quasi-independent "Commission des Participations et des Transferts" (formerly known as the Privatization Commission). Both of these consider financial and business plans submitted by bidders. While there is a strict legal and procedural process regulating these decisions, the confidential nature of off-market sales can raise suspicions about the equal treatment of foreign versus French bidders. This can in itself have a chilling effect on foreign investment. In the past, a policy of selling former holdings to "core" shareholders in an effort to avoid the splitting-up of companies or sales of sensitive state assets to foreign investors also hampered market efficiency and tended to favor French firms.

When privatizing state-owned firms either through off-market placements or market-based offerings, the 1993 privatization law gives the French government the option to maintain a so-called "golden share" to "protect national interests." This provision is not specifically targeted at foreign companies, and has not been a part of every case of privatization. A golden share gives the government three legal rights:

To require prior authorization from the Ministry Economy and Finance for any investor or group of investors acting in concert to own more than a certain percentage of a firm's capital. The thresholds would apply to all investors;

- To name up to two non-voting member's of the firm's board of directors; and
- To block the sale of any asset to protect "national interests." Assets could include not only shares, but buildings, technology, patents, trademarks, and any other tangible or intangible property.

Foreign Participation in R&D Programs

The French government sponsors R&D and technology development programs at three different levels:

- International/European programs (e.g. ESA, CERN, EUREKA);
- technology development programs in the private sector (49.5 percent of R&D expenditures are funded by French government) , with specific programs to encourage transfer of research and to aid small and medium firms; and

- national research programs, with specific emphasis given to space, physical science, aeronautics, telecommunications, electronics, nuclear, and engineering research.

The main orientations of France's global (public and private) R&D budget are reflected in the budget allocations: industrial innovation (50.5 percent funded by private companies); basic research and training (15.5 percent); military research (14.8 percent); civilian-grands programmes' in aerospace, electronics, telecommunications, and nuclear (8.2 percent); support to public research agencies (7.2 percent). The French contribution to EU programs (1.3 percent, USD 4 billion), also constitutes a research incentive with an important driving force.

In May 1999, the Interministerial Committee for Scientific and Technological Research defined five priorities in the following sectors:

- life science (genomics and post-genomics; fight against infectious diseases; neuro- and cognitive sciences);
- information technologies (nanotechnologies; software development);
- human and social sciences;
- energy and transportation;
- earth and environmental sciences.

An extra US dollar 200 million annual fund was set up to boost research in these specific areas.

For access to R&D subsidies, the French government gives national treatment to all foreign companies registered in France, allowing them to receive the same treatment as French companies. U.S. companies have experienced no difficulty in participating in these opportunities.

Visa, Work Requirements

The government of France requires that foreign citizens follow an extensive procedure if they wish to work in France. The requirements are essentially the same whether foreign citizens work for French or foreign-controlled firms. Non-EU nationals who intend to work or conduct any commercial activity in France must receive a long-term visa and a work permit (carte de travail) or business permit (carte de commerçant) before establishing residence in France. Information can be obtained from French embassies and consulates. The web address of the French embassy in Washington is www.info-france-usa.org/fembassy.htm, the internet address of the U.S. embassy in Paris is www.amb-usa.fr.

In addition, a foreigner's ability to practice a profession may be curtailed by government regulation and the regulations of French professional associations. For example, lawyers seeking to practice in France must become members of the French bar before they can practice any type of law under their own names. This requires passing the bar examination in French. (The ABA and Paris bar are working to develop a less onerous qualification system for American lawyers wishing to practice international law.)

A2. Conversion and Transfer Policies

All inward and outward payments must be made through approved banking intermediaries by bank transfers. There is no restriction on repatriation of capital. Similarly, there are no restrictions on transfers of profits, interest, royalties, or service fees. Foreign-controlled French businesses are required to have a resident French bank account and are subject to the same regulations as other French legal entities. The use of foreign bank accounts by residents is permitted.

France has few effective exchange control regulations. For exchange control purposes, the French government considers foreigners as residents from the time they arrive in France. French and foreign citizens are subject to the same rules. Residents are entitled to open an account in foreign currency with a bank established in France and to establish accounts abroad. Residents must report the account number for all foreign accounts on their annual income tax returns. French-source earnings may be transferred abroad.

A3. Expropriation and Compensation

Under French law, private investors are entitled to compensation if their properties are expropriated, and such compensation must be adequate and paid promptly. In France's bilateral investment treaties, the French government promises to provide both prompt and adequate compensation. There have been no recent disputes involving expropriation of U.S. investments.

A4. Dispute Settlement

There have been few major disputes involving established U.S. firms in recent years. Government decisions in investment cases can be appealed to administrative tribunals and ultimately to the Council of State (Conseil d'Etat). The rights of U.S. investors are also protected by the U.S.-French bilateral convention (see Section B below).

The judicial system is independent. Property and contractual rights are enforced by the French civil code. Judgments of foreign courts are accepted and enforced by courts in France once they have been "declared executory" by a French judge through "exequatur" proceedings (Art. 2123 of the French Civil Code and Art. 509 of the Civil Procedure Code). However, in some civil cases and in bankruptcy cases, foreign judgments are recognized and enforced by French courts without executory proceedings.

France is a member of the World Bank's International Center for the Settlement of Investment Disputes (ICSID -- www.WORLDBANK.org/html/extdr/ICSID.html). In addition, in most of its bilateral investment treaties (BIT's) it has agreed to accept binding arbitration to resolve investor-state disputes. However, because most of France's BIT partners are developing countries, investors from these countries have few investments in France. (See below).

A5. Performance Requirements and Incentives

Investment Incentives

France offers a range of financial incentives to foreign investors. Its planning and investment promotion agency, DATAR (Delegation à l'Aménagement du Territoire

et à l'Action Régionale), provides extensive assistance to potential investors. In addition, financial subsidies and tax incentives are offered at the local, regional and national government level to attract investment to the country's less affluent areas. Incentives are available equally to French and foreign investors and eligibility requirements are the same.

Within the French government, foreign investment promotion is the responsibility of the "Invest in France Mission" headed by an ambassador at-large, who is based at the Ministry of the Economy, and backed-up by DATAR. DATAR maintains offices throughout France and around the world to seek out and advise potential investors on project development, site selection, investment incentives (the largest of which are administered by DATAR) and administrative and legal requirements. There are four DATAR "Invest in France" agencies in the United States:

Eastern States

DATAR-IFA New York
810 Seventh Avenue, Suite 3800
New York, NY 10019
Tel: (212) 757-9340
Fax: (212) 245-1568

Western States

DATAR-IFA Los Angeles
1801 Avenue of the Stars, Suite 1248
Los Angeles, CA 90067
Tel: (310) 785-9735
Fax: (310) 785-9213

Midwestern States

DATAR-IFA Chicago
401 North Michigan Ave., Suite 565
Chicago, IL 60611
Tel: (312) 661-1640
Fax: (312) 661-0623

Southern States

DATAR-IFA Houston
2411 Fountainview Drive, Suite 130
Houston, TX 77057
Tel: (713) 266-9772
Fax: (713) 266-9884

Besides DATAR, several French cities and regions have developed their own investment promotion agencies that advise potential investors, offer administrative assistance, and oversee investment incentives. All incentives are covered by regulations set by the European Commission. The DATAR and Invest in France internet addresses are www.InvestinFranceNA.org (in English) and www.DATAR.gouv.fr.

The primary investment incentive offered through DATAR is the Prime d'Amenagement du Territoire (PAT). For industrial projects, PAT availability is differentiated. The standard PAT incentive of up to 17% of the value of the investment and FF 50 billion per job created by the investment can increase to 25%, 28% or 33% in more disadvantaged zones (including eastern France, part of the North and Corsica),

plus FF 70,000 per job created. For projects in the services sector, the PAT incentive is generally FF 70,000 per job created. DATAR will apply new rules in January 2000.

Other investment incentives may also be available. Potential investors should consult DATAR and Invest in France to determine the full range of possibilities, including,

- Research and development project grants
- Special tax treatment for company headquarters
- Local and regional tax holidays and special subsidies
- "Industrial conversion" zones featuring tax breaks and grants for job-creation
- Special access to credit for small and medium-sized enterprises
- Assistance for training, including a portion of wages paid to employees in training

Performance Requirements

Other than those linked to incentives, there are no mandatory performance requirements established by law. However, the French government will generally require commitments regarding employment or research and development from both foreign and domestic investors seeking government financial incentives. For example, to be eligible for DATAR grants, the French government usually requires that firms, whether owned by EU or non-EU residents, create a minimum of 20 jobs within the first three years. As noted above, PAT and R&D subsidies are based on the number of jobs created. In addition, the authorities have occasionally sought commitments as part of the approval process for acquisitions by foreign investors.

Nonetheless, foreign firms need the French government's approval on a variety of regulatory issues, and in France, officials generally have much wider discretion than their U.S. counterparts. This can leave firms subject to "unwritten" performance requirements, with regulatory officials making it known that a firm's request would be more favorably viewed if it increased employment, R&D, or exports.

A6. Right to Private Ownership and Establishment

The French government maintains legal monopolies in the following sectors: postal services (La Poste), national rail transportation (SNCF), Parisian bus and metro services (RATP), the supply and production of gas and electricity (GDF/EDF), and tobacco manufacturing and distribution (Seita).

The French government also remains a major shareholder in enterprises that compete with private firms. French and foreign private sector firms sometimes complain that government-owned enterprises receive favorable treatment in getting licenses, credit, and procurement contracts from the government. In addition, the French government has come to the financial rescue of state-owned firms experiencing difficulties. Private sector firms argue that these arrangements

unfairly reduce state-owned firms' financing costs.

A7. Protection of Property Rights

France is a strong defender of intellectual property rights and has highly developed protections for intellectual property. Under the French system, industrial property is protected by patents and trademarks, while literary/artistic property is protected by copyrights. By virtue of the Paris Convention and the Washington Treaty regarding industrial property, U.S. Nationals have a "priority period" after filing an application for a U.S. patent or trademark, in which to file a corresponding application in France. This period is twelve months for patents and six months for trademarks.

A8. Transparency of the Regulatory System

The French government has made considerable progress in recent years improving the transparency and accessibility of its regulatory system. Government Ministers, companies, consumer organizations and trade associations may petition the Unfair Competition Council to investigate anti-competitive practices.

Of most concern to foreign companies has been standards setting. With standards different from those in the U.S., rigorous testing and approval procedures must sometimes be undertaken before goods can be sold in France, particularly those that entail risk. When EU-wide standards do not exist, specific French standards apply. Mutual recognition agreements covering the testing and certification of certain specified regulated products have been negotiated by the United States and the EU. Information about these agreements and efforts to extend them can be found at the websites of the Trans-Atlantic Business Dialogue, www.TABD.com and the Commerce Department, www.MAC.DOC.gov/TABD/TABD.html. The National Institute of Standards and Technology, www.NIST.gov, is represented at the International Bureau of Weights and Measures, www.BIPM.fr, located in Sevres, France, and may be of assistance to firms.

Industry associations have an influential role in developing both government policies and influencing self-regulatory organizations. U.S. firms may find it useful to become members of local industry groups. Experience has shown that even "observer" status can offer U.S. firms an insight into new investment opportunities and greater access to government-sponsored projects, even if U.S. firms sometimes feel they are not always given an adequate opportunity to participate in the determination of regulations.

A9. Efficient Capital Markets and Portfolio Investment

Access to Capital and Capital Markets

France has an open financial market that gives firms easy access to a variety of financial products in both French and international markets. As markets expand, foreign and domestic portfolio investment has become increasingly important forms of investment. France continues to make progress in modernizing its marketplace, although progress in introducing tax-advantaged individual retirement funds, authorized by a 1996 law, has been blocked since July 1997. Facing the prospect of increasingly tough competition with other European marketplaces following the introduction of the euro, French financial markets are continually modernizing

and adapting their products, procedures and services. The French stock market has also joined with eight European counterparts in an effort to create a pan-European stock market. France is actively involved in the international effort to create a system of internationally accepted accounting standards (to read more, go to www.IASC.org.uk or search the SEC's website at www.SEC.gov). French market and banking regulators continue to enhance and develop cooperation with their foreign counterparts. French legal, regulatory and accounting systems may not be as transparent as U.S. systems, but are consistent with international norms.

Commercial banks offer all classical financing instruments, including short, medium, and long-term loans, short-and medium-term credit facilities, and secured and non-secured overdrafts. Commercial banks also assist in public offerings of shares and corporate debt, and mergers, acquisitions and takeovers. Banks offer hedging services against interest rate and currency fluctuations. France also had 136 foreign banks with total assets of over FF1 trillion at the end of 1997, some with sizable branch networks. Foreign companies have access to all banking services. Although some subsidies are available for home mortgages and small business financing, most loans are provided at market rates.

Increasingly, firms in France are bypassing banks and going directly to financial markets for their financing needs. The center of the French market is the Paris stock exchange (the Bourse) (local exchanges were closed in 1990), which listed 962 companies with a total capitalization of FF4.1 trillion (50% of GDP) in 1998. In 1996, a new electronic trading floor called the "Nouveau Marché" was created in which new companies, especially smaller ones with an emphasis on growth and technology, can raise start-up capital. A financial futures market, the "Marché à Terme des Instruments Financiers," commonly known as the MATIF, trades standard contracts on interest rates, short- and long-term bonds, stock market, indices and commodities. It has established linkages with its German and Swiss counterparts and well as with the Chicago Mercantile Exchange. An options exchange, the "Marché des Options Négociables de Paris (MONEP)," was established in September 1987. These markets operate under the auspices of the ParisBourse SBF, whose website address is (www.bourse-de-paris.fr). Finally, though not nearly as developed as in the United States or the United Kingdom, venture capital has become an increasingly important way for start-up firms to raise funds.

According to unofficial estimates, foreigners held approximately 36% of the capital of publicly traded French companies at the end of 1998. For a foreign company incorporated in an OECD country to be listed on the French stock exchange, it must be sponsored by a French bank or broker and prepare a French language prospectus. An application to the "Commission des Operations de Bourse (COB)" (the French equivalent to the SEC) must include French translations of three years of financial statements and an auditor's report on these statements. The sponsoring bank or broker is responsible for placing the securities with investors when the securities are listed and for acting as a market-maker. Special procedures apply to listing on the "Nouveau Marché." Companies must offer at least 100,000 shares with a value of at least FF10 million, or be able to demonstrate comparable liquidity in their home market if already listed on another exchange. Information is available at the Nouveau Marché's website, www.nouveau-marche.fr/bourse/nm/homenm-gb.html.

Cross-Shareholding

An intricate network of cross-shareholdings among French corporations has often been seen as a barrier to foreign acquisition of French firms. Often, two French companies will each own a significant share of the other. This system, which was traditionally a means to help ensure state-control of the economy, has weakened in recent years under the pressure of the marketplace.

Mergers and Acquisitions

In the 1990s, takeovers have become increasingly frequent, particularly those aimed at integrating complementary operations or product lines or at expanding market share. While French laws regarding takeovers do not discriminate against foreign investors, a hostile takeover in France by a foreign investor would face a good deal of public and even official scrutiny. Provisions of the company takeover law are designed to limit hostile takeovers of publicly traded companies. For example, stockholders are required to reveal themselves to company management and the authorities when their holdings total 5, 10, 20, 33 or 50 percent of the capital of the company. On crossing the 10 percent threshold, purchasers must declare their "intentions" for the period covering the coming twelve months. When a potential investor makes a "public offer to purchase" (OPA) shares in a publicly traded company, that offer must remain open for at least 20 working days for "friendly" bids and 35 working days for "unfriendly" bids. Both of these last two provisions were tightened in early 1997. Newcomers to the French stock market should also be aware of the possibility that by-laws of individual companies may impose requirements that purchasers of significant amounts of stock in a company report that purchase to the management of the company.

A10. Political Violence

Occasionally, anti-American sentiments, particularly among groups likely to be economically harmed by U.S. policies, produce demonstrations against U.S. investments. For example, in 1993, during the GATT negotiations, French farmers demonstrated against several American icons, such as McDonalds restaurants or the Euro Disney resorts, and in certain instances damaged property. However, these were mostly isolated incidents, and there is little risk of nascent insurrection, belligerent neighbors, or widespread civil disturbances.

A11. Corruption

France has laws, regulations and penalties that effectively combat acts of corruption committed in France. A 1993 law established a Central Service for the Prevention of Corruption under the aegis of the Ministry of Justice. The French judiciary is responsible for prosecution, and is active in doing so. There have been numerous investigations and convictions of public officials and businessmen under the anti-corruption statutes. Penalties for acts of corruption vary according to the circumstances; they often include fines and prison terms.

France has ratified and is in the process of developing legislation to implement the OECD Anti-Bribery Convention. More information about the agreement can be found at the OECD's internet address, www.OECD.org.

There have been no specific complaints from U.S. firms of unfair competition or

investment obstacles due to corrupt practices in France in recent years. More information on the international fight against corruption can be found at the internet site of Transparency International, www.Transparency.de, a private organization.

B. BILATERAL INVESTMENT AGREEMENTS

1959 U.S.-France Convention on Establishment

U.S. investment in France is subject to the provisions of the Convention on Establishment between the United States of America and France, which was signed in 1959 and is still in force. Some of the rights it provides to U.S. nationals and companies include:

- the right to be treated like domestic nationals in all types of commercial activities including the right to establish offices and acquire majority control of French firms. (This right does not apply to firms involved in communications, air transportation, water transportation, banking, the exploitation of natural resources, certain "professions," and the production of electricity) and in obtaining and maintaining patent and trademarks;
- the right to receive the best treatment accorded to either domestic nationals and companies or third country nationals and companies with respect to transferring funds between France and the U.S.; and
- the requirement that property may only be expropriated for a public purpose and that payment must be just, realizable, and prompt.

The treaty does not apply to the use of production or fissionable materials, arms, or any materials used directly or indirectly to supply military establishments. The treaty does not prevent application of measures necessary to protect essential security interests.

Bilateral Investment Treaties

Investments in France by other EU member states are governed by the provisions of the Treaty of Rome and by Union Law. France has also signed Bilateral Investment Treaties (BITs) with the following 61 countries: Albania, Argentina, Armenia, Bangladesh, Bolivia, Bulgaria, Chile, China, Congo (DROC), Czech Republic, Ecuador, Egypt, El Salvador, Equatorial Guinea, Estonia, Haiti, Hong Kong, Hungary, Indonesia, Israel, Jamaica, Jordan, Korea (South), Kuwait, Kyrgyzstan, Laos, Latvia, Liberia, Lithuania, Malaysia, Malta, Mauritius, Mongolia, Morocco, Nepal, Nigeria, Oman, Pakistan, Panama, Paraguay, Peru, Philippines, Poland, Romania, Russia, Singapore, Slovakia, South Africa, Sri Lanka, Sudan, Syria, Trinidad and Tobago, Tunisia, Turkmenistan, Ukraine, United Arab Emirates, Uruguay, Uzbekistan, Vietnam, Yemen, and Yugoslavia (Federal Republic).

Bilateral Investment Treaties signed with the following countries have not yet been ratified: Algeria, Azerbaijan, Brazil, Byelorussia, Costa Rica, Cuba, the Dominican Republic, Georgia, Guatemala, Honduras, India, Kazakhstan, Lebanon, Macedonia, Mexico, Moldova, Morocco, Namibia, Nicaragua, Qatar, Slovenia, and Tunisia.

French BITs generally cover the following:

- just and equitable treatment that is no less favorable than that accorded to domestic investors or the most favored investor from a third country;
- restrictions on expropriation of investments, and requirements that, in the case of expropriation, compensation be prompt and adequate;
- free transfers; and
- the ability to resolve investor-state disputes through binding international arbitration.

C. OPIC AND OTHER INVESTMENT INSURANCE PROGRAMS

Given France's high per capita income, investments in France do not qualify for investment insurance or guarantees offered by the Overseas Private Investment Corporation (OPIC). You can connect with OPIC at www.OPIC.gov.

D. LABOR

France's private sector labor force is one of the country's strongest points in attracting foreign investment, combining high quality with competitive unit wage costs.

The labor code sets minimum standards for working conditions including the work week, layoffs, overtime, vacation and personal leave. Other labor standards are contained in collective agreements, which are usually negotiated on a national or regional basis by the various unions and employers' associations. French absenteeism is modest by European standards and, in the private sector, peaceful labor relations have prevailed.

While the rate of unionization in France has steadily declined to about half that of the United States, French labor law provides an extensive institutional role for employee representatives and for organized labor.

In companies with more than 10 employees, employee delegates are elected for a one-year term. They are authorized to present individual or collective claims and grievances relating to working conditions, to inform government labor inspectors of any complaints under the labor law, and to concur with management in any reorganization of the work week. Management is required to meet with employee delegates at least monthly.

A company with more than 50 employees must have a joint management/employee enterprise committee, to which employee representatives are elected. The committee must be consulted for all major corporate decisions, but has no veto. The enterprise committee must be provided with the same information that is made available to shareholders. It is funded by the company at a rate equal to at least 0.2 percent of the firm's payroll, and uses this money to finance social and cultural activities for the benefit of employees.

Workers also hold most slots on occupational health and safety committees, which

are mandatory in medium and large size companies. Labor tribunals (playing a role largely equivalent to the NLRB in resolving labor disputes) are comprised of equal numbers of union and employer representatives. Appeals are possible to the level of the Cour de Cassation, one of France's high courts.

Due to a variety of macro and microeconomic factors, including high payroll taxes, a high minimum wage, and rigid labor laws, French businesses tend to use less labor intensive procedures and rely more on labor saving technology than businesses in other countries. This is one reason for France's high unemployment rate.

E. FOREIGN FREE TRADE ZONES/PORTS

France is subject to all European Union free trade zone regulations and arrangements. These allow member countries to designate portions of their customs territory as free trade zones and free warehouses. France has taken advantage of these regulations in several specific instances. The French Customs Service administers these zones and can provide more details: Customs can be contacted at the finance ministry web address: www.finances.gouv.fr.

In addition, the French government has established urban "enterprise zones" (Zones Franches Urbaines) in a 38 depressed or impoverished municipalities in France or its overseas territories. There are also two special investment zones (Zones d'Investissement Privilégié) located in the Nord-Pas-de-Calais region in which firms can benefit from certain tax credits.

More information on enterprise and investment zones is available from DATAR and Invest In France: InvestinFranceNA.org and www.DATAR.gouv.fr.

F. FOREIGN INVESTMENT STATISTICS: See Appendix D

VIII. TRADE AND PROJECT FINANCING

A. Banking System

The French banking system underwent a fundamental structural reform in 1984, which removed most of the distinction between commercial banks and merchant banks and grouped most financial institutions under a single supervisory system. The largest French commercial banks, such as Societe Generale, Credit Lyonnais, Banque Nationale de Paris, Credit Agricole, Paribas, CIC, and Credit Commercial de France, rank among the largest banks in the world. These commercial banks offer all classic financing instruments, including short, medium, and long-term loans, short-and medium-term credit facilities, and secured and non-secured overdrafts. Commercial banks also assist in public offerings of shares and corporate debt, as well as mergers, acquisitions and takeovers. Banks also offer hedging services against interest rate and currency fluctuations. France also has more than 170 foreign banks; some have sizeable branch networks.

The Bank of France ("Banque de France") is a member of the European System of Central Banks (ECSB) and the Banque de France's governor sits on the executive board of the European Central Bank. The Banque de France will continue to issue franc-denominated banknotes until the introduction of euro-denominated notes in 2002.

The Banque de France participates in the regulation and supervision of the French banking and financial system. Its governor is the chair of the Committee on Credit Institutions, which grants or withdraws banking licenses. The governor is also president of the Banking Commission, which ensures that banks adhere to banking regulations.

The French government has sold its majority equity stakes in major banks and insurance companies. However, it retains ownership of the Caisse des Depots et Consignations and minority stakes in several major financial institutions, including Credit Lyonnais.

B. Foreign Exchange Controls

All inward and outward payments must be made through approved banking intermediaries by bank transfers.

Repatriation of Capital and Earnings. There is no restriction on repatriation of capital provided this is carried out through an approved bank and the investment in question was authorized. Similarly, there is no restriction on transfers of profits, interest, royalties, or service fees, provided the investment was authorized and made through approved banks.

Businesses. Foreign-controlled French businesses are required to have a resident French bank account and are subject to the same regulations as other French legal entities. The use of foreign bank accounts by residents is permitted.

Individuals. France has few controls on the use of foreign exchange. For exchange control purposes, foreigners are considered to be residents from the time they arrive in France. French and foreign citizens are subject to the same rules. Residents are entitled to open an account in foreign currency with a bank

established in France and to establish accounts abroad. Residents must report the account number for all foreign accounts on their annual income tax returns. French-source earnings may be transferred abroad, without limitations if carried out through an approved bank.

C. General Financing Availability

Foreign companies have access to all banking services described in Section A. The other main financing is through French financial markets. The center of the French stock market is the Paris stock exchange (the "Bourse"). More details can be found in the Investment Climate Section of this report.

D. Export Financing

France has a sophisticated export financing market. In general, large commercial banks provide the bulk of export financing. These loans can be made to the French supplier or the foreign buyer. Most major U.S. banks and the U.S. Export-Import Bank provide both financing and technical assistance for the exports of American companies to France.

Eximbank's web site "www.exim.gov" provides information on its export credit insurance, pre-export financing through working capital guaranteed loans, and medium and long-term loans and guarantees to overseas buyers.

COFACE. The Compagnie Francaise d'Assurance pour le Commerce Exterieur (COFACE), insures exporters on commercial terms against short-term non-payment risks, principally involving trade with other OECD countries. These include the insolvency of private buyers, unfavorable currency fluctuations on ordinary business, and political risks in OECD countries. In these cases, COFACE acts like any other insurer: it set a competitive premium based on perceived risks.

COFACE's second function is to support French exporters in markets that conventional insurance companies are not willing to cover due to the perceived risks. These involve large projects, such as aircraft financing, as well as high risk markets. In these cases, COFACE acts on behalf of and with the backing of the French Government. This category includes market survey insurance, medium-term credit insurance on large-scale projects and capital goods, investment risks in foreign countries, and exchange rate guarantees on major contracts or large amounts. In this case, COFACE acts as the manager for the French government.

COFACE also provides "expert credit insurance" for French agricultural exports into "high risk" markets. These coverages are usually in direct competition with U.S. agricultural exports.

E. Correspondent U.S. Banking Arrangement

All large French banks have correspondent U.S. banking arrangements. Many French banks also have subsidiaries or branch offices in the United States:

Natexis (Houston, Los Angeles, New York)

Bank Nationale de Paris (Chicago, Dallas, Houston, Los Angeles, Miami, New York, San Fransisco)

Banque Paribas (Chicago, Dallas, Houston, Los Angeles, New York, San Fransisco)

Banque Sudameris (New York, Miami)

Caisse Centrale des Banques Populaires (New York)

CIC-Banque Transatlantique (Washington)

Compagnie Financiere de CIC et de l'Union Europeenne (New York)

Credit Agricole Indosuez (Chicago, Houston, New York, Menlo Park, San Fransisco)

Credit Commercial (New York, Philadelphia, Wayne)

Credit Lyonnais (New York)

Societe Generale (Atlanta, Chicago, Dallas, Houston, Kansas City, Los Angeles, New York, Orlando, Philadelphia, San Fransisco)

Below is a list of major American Banks present in Paris:

American Express International Banking Corporation

11 Rue Scribe

75009 Paris

Tel: (33) 1 47 14 50 00

Fax: (33) 1 47 14 51 99

Mr. Piero GRANDI, Président Directeur Général

Bank of America

43-47 avenue de la Grande Armée

75782 Paris Cedex 16

Tel: (33) 1 45 02 68 00

Fax: (33) 1 45 01 77 89

Mr. ODON DE VIENNE, Président Directeur Général

Bank of New York

13-15, boulevard de la Madeleine

75001 Paris

Tel: (33) 1 42 97 90 20

Fax: (33) 1 42 97 43 73

Madame Deidre PEYROUX, Representative

Chase Manhattan Bank SA

42 rue Washington

75408 Paris Cedex 08

Tel: (33) 1 53 77 10 00

Fax: (33) 1 53 77 10 50

Mr. Jean-Olivier BARTHOLIN, Président Directeur Général

Citibank

Citicenter, 19 Le Parvis

92073 Paris La-Défense Cedex 36
-Citibank International PLC (retail banking)
Tel: (33) 1 49 06 10 10
Fax: (33) 1 49 06 15 16
Mr. Bernard NOEL, Président Directeur Général
-Citibank NA (investment bank)
Tel: (33) 01.49.06.10.10
Fax: (33) 01.47.67.07.04
Mr. Jean-Claude GRUFFAT, Président Directeur Général

Morgan Guaranty Trust CO of New York
(JP Morgan)
14, Place Vendôme
75001 Paris
Tel: (33) 1 40 15 45 00
Fax: (33) 1 40 15 44 77
Mr. Philippe LAGAYETTE, Président Directeur Général

Republic National Bank of New York
20, Place Vendôme
75001 Paris
Tel: (33) 1 44 86 18 61
Fax: (33) 1 40 20 94 85
Mr. Robert Sevin, Président Directeur Général

IX. BUSINESS TRAVEL

Although French executives are becoming increasingly international in their outlook, Americans will occasionally encounter differences in business practices and cultural standards. Attention to the following points may improve the chances of a successful business trip to France.

A. Business Etiquette

The most important characteristics of French business behavior are its emphasis on courtesy, and a certain formality. Appointment schedules and hierarchical titles are to be respected and correspondence--whether by mail or by fax--should be acknowledged promptly. A hand-shake is customary upon initiating and closing a business meeting, accompanied by an appropriate greeting. Professional attire is expected.

Today, many French executives put less emphasis on long, heavy business lunches for reasons of health and time. Nevertheless, informal business discussions in restaurants where everyone appreciates a good meal are one of the best ways to promote good working relations.

The working days abutting the French holidays and vacation periods are not "prime time" for business meetings; this could include the month of August and the several vacation periods between Christmas and Easter. Business hours in France are generally 9:00 AM to 6:00 PM (banking hours 9:00-4:30) Monday through Friday while stores are generally open 10:00 AM to 7:00 PM, Monday through Saturday. To ensure availability, advance appointments are recommended.

B. Entry of persons and things

Every U.S. citizen entering France must present a valid American passport; for stays of less than 3 months there is no requirement for visas, entry permits or health certificates.

Bona fide personal effects in a visitor's luggage (or hand-carried) are not normally subject to customs duties nor the 20.6 percent value-added tax. Items to be declared, however, include those intended to be left in France, goods for professional/commercial use as well as any prohibited items. Goods imported for exhibition may enter under bond, deposit or an ATA carnet. Professional equipment may be temporarily imported into France free of duty and tax under the Customs Convention on Temporary Importation of Professional Equipment; the appropriate carnet may be obtained from the U.S. Council of the International Chamber of Commerce.

C. Electrical Characteristics/Communications

Electric current in France is 220 volts AC, 50 cycles. A transformer is needed for most U.S. electrical equipment and appliances.

Telecommunications to and from Paris compare favorably with those in any large U.S. city. A direct-dial telephone system links France to the U.S. and most of the world. Calls to the States may be charged to international telephone cards

such as AT&T, MCI and Sprint; international directory inquiries may be reached by dialing 0-800-99-00-11 (AT&T Direct U.S. operator). Most public phones in France are equipped for the convenient "Telecartes" (pre-paid cards) available in tobacco shops, post offices and subway/railway stations at 50 francs for 50 units.

D. Transportation

Frequent direct air service is available to many U.S. and French cities. The two airports serving Paris--Charles De Gaulle (Roissy) and Orly--are easily accessible by excellent bus (Air France) and rail service. The French railway system is among the best in the world; its efficient network ties in conveniently with public transportation in most French cities.

Buses and the Metro (subway) may be crowded during rush hours but they provide fast and efficient service, however, a word to the wise: as in many large cities world-wide, one should be alert to the dangers of pick-pockets while in public places.

E. Climate and Clothing

France's climate is temperate which varies somewhat from north to south. Rain is frequent and most experienced travelers carry collapsible umbrellas. Average temperatures in Paris range from 25 degrees Celsius (77 degrees F) in mid-summer to 6 Celsius (43 degrees F) in winter. Collar, tie and a dark business suit for men are very useful, especially in Paris. For women, similar attire is appropriate, but it should be noted that women in France do not dress as conservatively as in the U.S.

F. Bed and Board in Paris

February 1998 estimates of the Department of State for reasonable lodging and meal/incidental expenses for a business traveler are respectively \$151 and \$96, per day. One could pay less or a great deal more than this \$247 amount.

In France the ground floor in buildings is identified as "RC" (Rez-de-Chaussee) and the next floor up is considered the first floor.

Tipping in France is largely optional since a 15 percent service charge is normally included in restaurant bills. Small, additional tips are often left for particularly good service. Parisian taxi drivers may be tipped by rounding up the payment to include up to 10 percent of the fare. At no time in France are tips obligatory.

G. Commercial Language

While French is the official language in France, many business people speak English. Product literature, correspondence and negotiations in the French language provide a distinct advantage over competitors who use only English. It should be noted that other EU suppliers are accustomed to dealing in the French language.

H. Useful Addresses

Foreign Agricultural Service (FAS)
U.S. Embassy

2, avenue Gabriel
75382 Paris Cedex 08
TEL: (33) 1.43.12.22.45
FAX: (33) 1.43.12.26.62
Internet: <http://www.amb-usa.fr/fas/fas/htm>
E-mail: fasparis@compuserve.com

The Commercial Service (CS)
U.S. Embassy
2, avenue Gabriel
75382 Paris Cedex 08
TEL: (33) 1.43.12.22.22
FAX: (33) 1.43.12.21.72
Internet: <http://www.ita.doc.gov/uscs>
E-mail: Paris.Office.Box@mail.doc

American Hospital in Paris
63, boulevard Victor Hugo
92202 Neuilly sur Seine
Telephone: (33) 1.46.41.25.25
(24-hour English-speaking medical and dental emergency service; credit cards accepted.)

Emergency Medical Team and Ambulance (SAMU)
Telephone: 15 or (33) 1.45.67.50.50

Police Department
Telephone: 17

Fire Department
Telephone: 18

I. French Holidays

January 1, 2000	New Year's Day
April 24, 2000	Easter Monday
May 1, 2000	Labor Day
May 8, 2000	Veterans' Day (WWII)/Ascension Day
June 1, 2000	Ascension Day
June 12, 2000	Whit Monday
July 14, 2000	French National Day
August 15, 2000	Assumption Day
November 1, 2000	All Saints' Day
November 11, 2000	Veterans' Day (WWI)
December 25, 2000	Christmas

X. ECONOMIC AND TRADE STATISTICS

APPENDIX A - COUNTRY DATA

1. PROFILE

POPULATION: 60 million

RELIGION: 90% Roman Catholics, 5% Muslim, 2% Protestants, 1% Jewish, 2% unaffiliated

GOVERNMENT: Republic
Head of State: Jacques Chirac
Head of Gov't: Lionel Jospin

LANGUAGE: French

WORK WEEK: 39 hours

CONTACTS:

- The Commercial Service

Minister Counselor for Commercial Affairs: Kevin Brennan
TEL: (33) 1.43.12.23.57; FAX: (33) 1.43.12.24.12
E-mail: Kevin.Brennan@mail.doc.gov
Internet: <http://www.amb-usa.fr/fcs/fcs.htm>
<http://www.sce.doc.gov>

Country Desk Officer: Paul Dacher
TEL: (202) 482-6008; FAX: (202) 482-2897
E-mail: Paul_Dacher@ita.doc.gov

US&FCS Regional Director/Europe: Carlos Poza
TEL: (202) 482-1599; FAX: (202) 482-1599 & 3159
Carlos.Poza@mail.doc.gov

- U.S. Department of Agriculture - Foreign Agricultural Service

Minister Counselor for Agricultural Affairs: Frank Piason
TEL: (33) 1.43.12.22.77, FAX: (33) 1.43.12.26.62,
E-mail: fasparis@compuserve.com

APPENDIX B.**DOMESTIC ECONOMY**

DOMESTIC ECONOMY (USD Millions)

	<u>1998</u>	<u>1999</u> (for)	<u>2000</u> (for)
GDP (current USD, billions)	1401	1391	1422
GDP real growth rate (percent)	3.2	2.3	2.6
GDP per capita (USD)	23,818	23,568	23,987
Government spending as a percentage of gdp	54.3	54.1	53.6
Inflation - CPI (percent)	0.7	0.9	1.1
Unemployment rate (percent)	11.8	11.3	10.8
Foreign Exchange Reserves (Current USD billions)	71	n/a	n/a
Average Exchange Rate (Francs per USD)	5.899	6.092	6.180

Note: forecasts and
assumptions for 1999
and 2000 are based on
OECD Economic Outlook
of June 1999

MAJOR AMERICAN EXPORTS TO FRANCE - 1998

Rank / HS	Description	Exports (in USD millions)
1/	714 Engines & motors, nonelect & parts, n.e.s.	2,460
2/	792 Aircrafts & associated equip.; spacecraft vehicles & Parts	1,893
3/	759 Parts etc for office machine & auto data processing machines	797
4/	752 Automatic Data processing machines & units thereof	793
5/	874 Measuring/checking/analysing & control instruments n.e.s.	745
6/	776 Thermionic, cold cathode, photocathode valves etc.	721
7/	764 Telecommunications equipment, n.e.s. & parts, n.e.s.	505
8/	872 Instruments & appliances, n.e.s, for medical, dental etc.purpose	477
9/	994 Estimate low value shipments; can low value & n.i.k.	454
10/	541 Medicinal etc. products, except medicaments	420
11/	598 Miscellaneous chemical products, n.e.c.	294
12/	515 Organo-inorganic & heterocyclic compounds etc	290
13/	778 Electrical machinery and apparatus	261
14/	774 Electro-diagnostic apparatus	251
15/	784 Parts & accessories of motor vehicles, etc.	210
16/	542 medicaments (including veterinary medicaments)	207
17/	743 Pumps, air or other gas compressors & fans	205
18/	896 Work of arts, collectors'pieces & antiques	204
19/	728 Machinery etc. specialized for particular industries n.e.s.	199
20/	251 Pulp & waste paper	251

MAJOR AMERICAN IMPORTS FROM FRANCE - 1998

Rank / HS	Description	Imports(in USD millions)
1/	792 Aircrafts & associated equip.; spacecraft vehicles & Parts	3,023
2/	714 Engines & motors, nonelect & parts, n.e.s.	2,667
3/	896 Work of arts, collectors'pieces & antiques	1,451
4/	112 Alcoholic beverages	1,405
5/	776 Thermionic, cold cathode, photocathode valves etc.	932
6/	784 Parts & accessories of motor vehicles, etc.	855
7/	931 Special transactions & commodities not classified by kind	796
8/	553 Perfumery, cosmetics, or toilet preparations, except soaps	619
9/	515 Organo-inorganic & heterocyclic compounds etc	448
10/	728 Machinery etc. specialized for particular industries n.e.s.	354
11/	874 Measuring/checking/analysing & control instruments n.e.s.	327
12/	723 Civil engineering & contractors' plant & equipment	322
12/	722 Tractors (other than mechanical handling equipment)	322
14/	542 medicaments (including veterinary medicaments)	293
15/	541 Medicinal etc. products, except medicaments	290
16/	984 Estimate low value import transactions	268
17/	772 Electrical apparatus for switching or protect. Elect. circuits	251
17/	514 Nitrogen-function compounds	251
17/	673 Iron & nonalloy steel flat-roll products, non clad etc.	251
20/	665 Glassware	240

* HS refers to the Harmonized System by which goods are classified for the purpose of international trade

Source: <http://www.ita.doc.gov/industry/otea/usfth/top80cty/france.cp>

Average Exchange rate for CY 1998: USD 1 = FF 5.90

Source: Department of Treasury

**TOTAL FRENCH IMPORTS OF FOOD AND AGRICULTURAL PRODUCTS
AND U.S. MARKET SHARE VALUE CY 1998**

	Total	From U.S.	% U.
	----- in U.S. Million		

High Value Products:			
- Meat and Offals	2,872	29	1.0
- Dairy and Eggs	2,114	2	0.1
- Coffee, Tea and Spices	1,179	1	0.1
- Manufactured Tobacco	1,610	7	0.4
- Prepared Meat	265	-	--
- Fish and Seafood, Fresh or Frozen	2,638	107	4.1
- Prepared Fish & Seafood	792	7	0.9
- Processed Grains	222	1	0.4
- Sugar & Confectionery	561	5	0.1
- Cocoa & Chocolate	1,465	3	0.2
- Prepared Grain Products	1,498	11	0.7
- Fresh & Dry Vegetables	1,499	29	1.9
- Fresh & Dried Fruits	2,537	118	4.6
- Processed Fruits & Vegetables (1)	1,759	81	4.6
- Misc. Food Preparations	957	31	3.2
- Beverages (except spirits)	1,262	14	1.1
- Spirits	510	29	5.7
Sub Total High Value Products	23,740	475	2.0
Sub Total Bulk Products (*)	7,803	505	6.5
TOTAL HIGH VALUE + BULK PRODUCTS	31,543	980	3.1

(*) Includes live animals & animal products, nursery products, grains, oilseeds and seeds, plants for weaving, vegetable extracts, fats and oils, protein meals and other feeds, wood, unmanufactured tobacco and raw products (i.e., cotton, silk, wool & other animal hair, raw hides and skins)

- Means nil or insignificant

1/ Including fruit juices

Source: French Customs

APPENDIX C - TRADE

MERCHANDISE TRADE (USD
billions, except as noted)

	<u>1997</u>	<u>1998</u>	<u>1999</u> (for)
Total Exports (F.O.B.) excl. military equipment	285	300	303
Total Imports (C.I.F.) excl. military equipment	270	286	293
Exports to US (F.O.B.) excl. military equipment	19	22	22
Imports from US (C.I.F.) excl. military equipment	23	25	25
U.S. share of imports (percent) excl. military equipment	8.9	8.9	8.9
Trade balance with the US	-3.1	-3.1	-3.4
Average real growth rate of imports from world (percent)	9.8	7.1	5.3
Average real growth rate of imports of manufactured products from the US	14.7	11.5	8.2
Trade balances with three leading partners (CIF/FOB)			
-Germany	0.6	-1.3	-1.3
-Italy	-0.0	1.1	-0.9
-United Kingdom	6.0	6.3	5.9

Source: Official French
Government data

Note: forecasts for 1999 are
based on OECD Economic Outlook
of June 1999

APPENDIX D: FOREIGN INVESTMENT STATISTICS

Table1 - Inward FDI

Stock by Country of Origin (1) (FF billions)

	<u>1995</u>	<u>1996</u>	<u>1997</u>
OECD	678.3	727.4	849.2
EU, of which	446.2	480.1	574.5
Netherlands	121.2	130.8	142.9
United Kingdom	99.5	100.9	139.0
Germany	75	82.1	101.8
Belgium	55.2	62.7	69.8
Italy	54.5	50.3	56.4
Spain	6.7	9.7	11.5
Other (2)	34.1	43.6	53.1
North America, of which	154.8	157.6	172.0
USA	150.4	152.3	167.5
Canada	4.4	5.3	4.5
Other OECD countries, of which	77.3	89.7	102.7
Switzerland	62.1	69.8	82.3
Japan	12.3	15.3	16.8
Other	2.9	4.6	3.6
Non-OECD countries, misc.	25.7	26.4	36.7
Total	704.0	753.8	885.9
as a percent of GDP	9.1	9.5	10.8

(1) Booking value of investment excluding FF 3.1 billion in reinvested earnings which are not available on a geographical basis

source: Bank of France

Table 2 - Inward FDI

Stock by Main Industrial Sector Destination (1) (FF billions)

	<u>1995</u>	<u>1996</u>	<u>1997</u>
Companies (diversified)	173.4	154.4	(2)
Banking	116.9	131.8	(2)
Chemicals	77	90.2	(2)
Wholesale/Retail Trade	67.8	71.3	(2)
Food, drinks, tobacco	44.5	57.2	(2)
Energy	29.2	29.4	(2)
Office machines	22.7	24.5	(2)
Transportation	24.3	22.1	(2)
Paper, press, editing	17.0	19.5	(2)
Insurance	17.1	16.3	(2)
Other retail services	27.4	36.0	(2)
Other	86.7	101.1	(2)
Total	704.0	753.8	885.9

(1) Book value of investment

(2) The Bank of France will publish data at the end of August 1999

source: Bank of France

Table 3 - Inward FDI

Flows by Country of Origin (1) (FF billions)

	<u>1996</u>	<u>1997</u>	<u>1998</u>
OECD	115.5	125.9	(2)
EU, of which:	85.4	94.4	
United Kingdom	21.6	38.0	(2)
Netherlands	19.8	12.1	(2)
Germany	6.8	19.7	(2)
Belgium	20.4	11.2	(2)
Italy	4.5	6.1	(2)
Spain	1.6	1.8	(2)
Other	10.7	5.4	(2)
North America, of which:	19.2	15.8	(2)
USA	17.1	15.2	(2)
Canada	2.1	0.6	(2)
Other OECD countries, of which:	10.9	15.4	(2)
Switzerland	9.7	12.4	(2)
Japan	0.5	1.6	(2)
Other	0.6	1.4	(2)
Non-OECD Countries, misc.	2.3	6.3	(2)
Total	117.8	132.3	165.4
as a percent of GDP	1.5	1.7	2.0

(1) Market value of investment

(2) The Bank of France will publish data at the end of August 1999

source: Bank of France

Table 4 - Outward FDI

Stock by Country of Destination (1) (FF billions)

	<u>1995</u>	<u>1996</u>	<u>1997</u>
OECD	764.5	819.8	989.2
EU, of which:	494.7	526.0	629.1
Netherlands	135.6	131.1	136.9
United Kingdom	85.9	94.8	133.8
Belgium	84.9	89.8	101.2
Germany	49.7	54.7	78.7
Spain	51.7	51.9	59.5
Italy	40.1	44.7	56.3
Other	46.8	59.0	62.7
North America, of which:	187.7	214.7	262.7
USA	176.5	202.9	249.8
Canada	11.2	11.8	12.9
Other OECD countries, of which	82.1	79.1	97.4
Switzerland	53.3	39.9	50.2
Other	28.8	39.2	47.2
Non-OECD Countries, misc.	139	190.7	218.2
Total	903.5	1010.5	1207.4
as a percent of GDP	11.7	12.71	14.7

(1) Book value of investment

source: Bank of France

Table 5 - Outward FDI

Stock by Industrial Sector Destination (1) (FF billions)

	<u>1995</u>	<u>1996</u>	<u>1997</u>
Banking	186.0	172.0	(2)
Companies (diversified)	94.6	119.4	(2)
Energy	91.6	109.6	(2)
Insurance	77.9	86.5	(2)
Chemicals	71.2	77.2	(2)
Processed food	46.5	75.7	(2)
Metallurgical industries	27.4	48.2	(2)
Mechanical engineering industries	29.4	40.6	(2)
Transportation	43.9	37.1	(2)
Repairs, trade	38.3	35.7	(2)
Hotels, restaurants	20.7	26.0	(2)
Other	176	182.5	(2)
Total	903.5	1010.5	(2)

(1) Book value of investment

source: Bank of France

Table 6 - Outward FDI

Flows by Country of Destination (1) (FF billions)

	<u>1996</u>	<u>1997</u>	<u>1998</u>
OECD	118.4	166.0	(2)
EU, of which:	75.5	103.1	(2)
United Kingdom	8.5	39.0	(2)
Germany	13.4	24.2	(2)
Italy	11.3	11.6	(2)
Spain	5.3	7.6	(2)
Belgium	19.1	21.1	(2)
Netherlands	11.9	5.8	(2)
Other	6.0	-6.2	(2)
North America, of which:	32.1	48.0	(2)
USA	29.7	46.9	(2)
Canada	2.4	1.1	(2)
Other OECD countries, of which:	10.9	14.9	
Switzerland	2.7	10.3	(2)
Other	(2)		
Non-OECD Countries, misc.	30.2	30.7	(2)
Total	148.6	196.8	239.4

as a percent of GDP

(1) Market value of investment

(2) The Bank of France will publish data at the end of August 1999

source: Bank of France

Table 7: Major Foreign Investors

Today, foreign-controlled firms play a significant role in France's economy: they account for 22 percent of the workforce, 27 percent of capital expenditures, 30 percent of exports and 30 percent of production.

Major foreign investors by industry include in approximate order by size:

Agribusiness

Eridania Beghin-Say (Montedison-ITA)
Nestle (Nestle, SWIZ)
Unilever France (Unilever, USA)
Perrier-Vittel (Nestle, SWIZ)
Cargill France (Cargill, USA)
Kraft-Jacob-Suchard France (Philip Morris, USA)
Unisabi and Mars Alimentaire (Mars, USA)
Coca-Cola Beverages (Coca-Cola, USA)
Heineken (Heineken, NL)
G.H Mumm et Cie (Seagram, CAN)
CPC France (Bestfoods, USA)
Kellogg's Produits Alimentaire (Kellogg's, USA)
Spillers Petfoods France (Dalgety, GB)
Wrigley (Wrigley, USA)
Salins du midi et Salines de L'est (Morton International, USA)
Douwe Egberts France (Sara Lee, USA)
Lindt et Sprungli (Lindt, SWIZ)
Vamo Excel (Vandermoorle, Belgium)
Schweppes-France (Cadbury Schweppes, GB)

Chemicals

Solvay en France (Solvay, Belgium)
Groupe BASF en France (BASF, GER)
Exxon Chemical France (Exxon, USA)
Groupe Kodak-Pathe (Eastman Kodak, USA)
Bayer SA (Bayer A.G, GER)
3M France (3M, USA)
Montell France (Montell, NL)
SKW Biosystems (SKW Trostberg, GER)
Hydro Agri France (Norsk Hydro, N)
CIBA Specialites Chimiques (CIBA, SWIZ)
Polimeri Europa France (Polimeri Europa, Italy)
Dow France (Dow, USA)
ICI France (ICI, GB)

Pharmaceuticals/Cosmetics

Novartis Groupe France (Novartis, SWIZ)
Procter et Gamble (Procter et Gamble, USA)
Laboratoire Glaxo Wellcome (Glaxo Wellcome, GB)

Laboratoires MSD-Chibret (Merck & Co, USA)
Colgate-Palmolive (Colgate-Palmolive, USA)
Lipha (Merck, GER)
Smithkline Beecham (Smithkline & French, NL)
Produits Roche (Roche, SWIZ)
Lever (Unilever, NL)
Lilly france (Eli Lilly, USA)
Pfizer (Pfizer, USA)
Laboratoires Houde (HMR, GER)
Janssen Cilag (Johnson & Johnson, USA)
Schering-Plough (Schering, SWITZ)
Beiersdorf (Beiersdorf, GER)
Laboratoires Roussel (Hoechst, GER)

Plastics

Valois (Aptargroup, USA)
Recticel (Recticel, Belgium)
Raccords et Plastiques Nicoll (Etex Group, Belgium)
Perstorp (Perstorp, S)
Wavin (Wavin BV, NL)
UDD-FIM (Von Roll Isola, SWITZ)
Viskase (Viskase, USA)
Sofab (Rexam, GB)
Thermo.Cousin-Tessier (Tessenderlo, Belgium)
Isobox Technologies (Synbra, NL)
Arizona Chemical (International paper, USA)
Formica (Formica Int., USA)
DSM engineering Plastic Products (Axxis, Belgium)
Menzolit (Dynamit Nobel, GER)
Plastival (Group Tessenderlo, Belgium)
Schenectady Europe (Schenectady, CAN)
Scott Bader (Scott Bader, GB)
Coexpan France (Coexpan, E)
Gidi Production (Groupe Otto, GER)
Schmalbach Lubeca Pet Containers (Schmalbach Lubeca, GER)
Stac Enichem (Enichem, ITA)

Electronics /Information Technology

Compagnie Francaise Philips (Philips, NL)
Siemens (SIEMENS, GER)
Sony France (Sony, J)
EL. FI SA (El.Fi Spa, ITA)
Motorola Semiconductors (Motorola Corp, USA)
Nortel Matra Cellular Cellular (Nortel, CAN)
Schlumberger Industries (Schlumberger, AND)
Electrolux France (Electrolux, S)
ASEA Brown Bovari (ABB, CH)
Cables Pirelli (Pirelli, ITA)
Canon France (Canon, NL)
Texas Instruments France (Texas instruments, USA)
Whirlpool France (Whirlpool Europe, USA)
Nokia France (Nokia, SF)

Merloni Electromanager (Merlonie Aristone)
ITT Composants et Instruments (ITT, USA)
SEW-USOCOME (SEW, GER)
Solelectron France (Slectron corp, USA)
Osram (Osram, GER)
Samsung Electronics France (Samsung, CRS)
Tecnoffra (United Techno, USA)

Machinery and Equipment

AGCO Ex Massey-Ferguson (Varity, USA)
John Deere (Deere, USA)
Caterpillar France (Caterpillar, CH)
Liebherr France (Liebherr Inter., CH)
Baxter (Baxter Intern., USA)
Roux Combaluzier Schindler (Schindler Holding, CH)
Trane (American Stand, USA)
Fenwick-Linde (Linde, GER)
INA Roulements (Ina Waelzlager Schaeffler, GER)
Becton Dickinson France (Becton Dickinson, USA)
KSB (KSB, GER)
Schindler (Schindler, CH)
Heidelberg Webspress (Heidelberg Druckmaschinen, GER)
Wartsila NSD France (Wartsila NSD, CH)
Carrier (United Technologies, USA)
Sanifrance Porcher Distribution (American Standard, USA)
Wartsila Cummins (Wartsila NSD, SF)
Still and Saxby (Linde, GER)
La Continentale D'entreprises (Harwanne, CH)
Viessman (Viessman, CH)
Martin (Bobst, CH)
Cresser rand (Dresser Rand, USA)
PPM (Terex, USA)
Pompes Salmson (Wilo Samson, GER)
MIC (Jungheinrich, GER)
Neopost (BC Partners, GB)

Metals Industry

Trefimetaux (KM Europa Metal, GER)
Union Miniere France (Union Miniere SA, Belgium)
Haironville (Cockerill Sambre, Belgium)
GTS Industries (Dillinger Huttenwerke, GER)
Sandvik (Sandvik Finance, NL)
Lamines Marchands Europeens (Beltrame, ITA)
Alcan France (Alcan Aluminium LTD, CAN)
Fabrique de fer de Maubeuge (HB Holding, Belgium)
Ferembal (Suiza Packaging Group, USA)
Europipe France (Europipe, GER)
Ferco International (Orba, GER)
Beautor (Cockerill Sambre, Belgium)
Spit (TW, USA)
Reynolds Aluminium France (Reynolds, USA)
Howmet (Carlyle & Thiokol, USA)

Valmex (Textron, USA)
Vachette (Assa Abloy, S)
Bundy (TI Group, GB)
Gallay (Mauser Werke, GER)
Griset (Diehl Stiftung, GER)
Redaelli Tecna, ITA)

Transportation Equipment

ANF Industrie (Bombardier, CAN)
Messier Dowty (Messier Dowty Int., GB)
Liebherr Aerospace Toulouse (Liebherr International, CH)
Rohr Europe (Rohr Europe)
Sarma (SKF, S)
Secan (Allied Signal Aerospace, USA)

Leisure, Jewelry, Paper

Salomon (Adidas, GER)
Groupe Hasbro France
Waterman (Gilette, USA)
Jeux Nathan (Ravensburger, GER)
Editions Ravensburger (Ravensburger, GER)

Energy

Petroles Shell (Royal Dutch Company, NL/GER)
BP France (BP Europe, GB)
ESSO SAF (Exxon, USA)
Fina France (Fina, Italy)
Mobil Oil Francaise (Mobil, USA)
AGIP Petroli (Agip Petroli, ITA)
Fuchs Labo (FPOC, GER)
Fuchs Lubrifiants Industrie (Fuchs, GER)

Textile/Leather/Clothing

DIM (Sara Lee, USA)
Paul Hartmannn (Hartmann, GER)
Hexcel Fabrics (Hexcel, USA)
Playtex France (Sara Lee, USA)
Filix Lastex (Worldtex, USA)
Triumph International (Triumph Univer., CH)
Jalla (Zucchi Basseti, ITA)
Na-Pali (Quik Silver, USA)
Eminence (Schiesser Eminence, CH)
Mosley Badin (Mossley, GB)
Venilia (Solvay, Belgium)
Chaussures Bally France (Bally International, CH)
Nordlys (Polymer Group, USA)
Martel Catala SA (Albany International Holding-Selestat, USA)
Benetton France (Benetton, ITA)
Standard Wool France (Standard Wool, USA)
CS- Interglas (CS Interglas AG, GER)

Polo Europe (Polo International, Belgium)
A.Lafont (Wagram Equity Partners, NL)
Mossley Sartel (Mossley, GB)
Bonar (Low and Bonar, GB)
Levi Strauss France (Levi Strauss, USA)
Sefar Flytis (Sefar Holding, CH)

Communication/Printing

Prisma Presse (Gruner + Jahr, GER)
Imprimeries Quebecor (Quebecor, CAN)
Polygram (Polygram Int., NL)
Editions Atlas (Di Agostini, N)
Ogilvy et Mather (WPP, GB)
Emap France (Emap, GB)
Buena Vista Home Entertainment France (Walt Disney, USA)
Selection du Reader's Digest (Reader's Digest, USA)
Les Echos (Pearson, GB)
Moore France (Moore, CAN)
Editions Lamy (Wolters Kluwer, NL)
Groupe Liaisons (Wolters kluwer, NL)
Warner Home Video (Time Warner, USA)
CIC Video (CIC International, NL)
Radio Nostalgie (RMC, Monaco)
Eurodirect Marketing (Exacta, Monaco)
Editions Technique et Touristiques (Motor Presse International, GER)
Video Communication France (CLT, L)
Avantages (IPC, GB)
Rothmans International France (Rothmans Int., NL)
Editions Scientifiques et Medicales Elsevier (Reed Elsevier, GB)
Island Records France (Polygram, NL)
Universal Music (MCA records, USA)
Hemispheres (Burke Communication Holding)
Burke Communication (Burke Communication Holding)
Hebdo Mag France (Hebdo Mag Europe, NL)
Imprimerie Georges Frere (Mercator Press, Belgium)

Building (Materials)

Ciments Francais (Cimenti, ITA)
Imetal (Pargesa, GBL, Belgium)
BPB Placo (BPB, GB)
Origny (Holderbank, CH)
RMC france (RMC, GB)
PPG Industries Glass (PPG Industries, USA)
Sediver (Santavaleria, ITA)
Villeroy ET Boch (Vil & Boch, GER)
Rockwool Isolation (Rockwool International, DK)
Redland Couverture (Redland, GB)
Siplast (Icopal, DK)
Corning (Corning, USA)
Pilkington France (Pilkington Group, GB)
Armstrong Building Products (Armstrong Cork Finance Company, USA)
Sifracco (Sibelco, Belgium)

Newell (Newell, USA)
VDG (Bormioli Rocco, ITA)
Owens Corning Fiberglass France (Owens Corning, USA)
Verreries de la Chapelle (Bormioli Rocco Int. ITA)
Britax GECO (Britax International, GB)
Vesuvius France (Groupe Cookson, GB)
Carmeuse France (Carmeuse, Belgium)
Migeon (Laufen, CH)
Duravit (Duravit, GER)
Master Builders Technologies (SKW Trosdberg, GER)
Verretubex (Anchor Glass, GB)
Pilkington Ouest (Pilkington, GB)
Societe des Ceramiques Francaises (US Filter, USA)
Schott Verrerie Medicale (Schott Zeiss France Holding, GER)
BISCH (Keramick, CH)

Distribution

OCP (Gehe, GER)
FIAT (FIAT, ITA)
Ford France (Ford, USA)
VAG France (VAG, GER)
Opel France (Delphi/General Motors, USA)
Cargill (Cargill, USA)
Sony France (Sony, JAP)
Primagaz (SHV Energy, NL)
Darty (Kingfisher, GB)
LDI France (Lidl, GER)
Pum Station Service Acier (Cockerill Samb., BEL)
Rank Xerox France (Rank Xerox, USA)
BMW France (BMW, GER)
IVECO/Fiat France (Fiat, ITA)
Compagnie Continentale France (Continental Grain, USA)
Brossette BTI (Wolseley, UK)
Compaq France (Compaq, USA)
Rover France (Rover Holding, UK)
Worex (ESSO, USA)
Lexmark International (Lexmark International, USA)
Canon France (Canon, JAP)
Nissan France (Nissan, JAP)
Cica (Jardin Intl. Motor, UK)
Schulze (Schulze, GER)
Whirepool France (Whirepool, USA)
Toshiba Systems (Toshiba, JAP)
Meubles Ikea France (Ingeka, SWE)
Dow France (Dow Chemical, USA)
Texas Instruments (Texas Instruments, USA)

Banks

Sumitomo Bank (Tae Sumitomo Bank, JAP)
BIP (Dresdner, GER)
Sanwa Bank (Sanwa Bank, JAP)
ABN-AMRO France (ABN-AMRO France)

UBS France (UBS, SWIZ)
SOVAC (General Electric, USA)
Neuflize Schlumberger Mallet (ABN AMRO, NL)
JP Morgan (Morgan, USA)
Banque du Phoenix (ABN-Amro, NL)
Banco Santander (Banco Santander, SP)
Sakura Bank (Sakura Bank, JAP)
Morgan Garanty Trust (JP Morgan, USA)
Banque San Paolo (San Paolo, ITA)
Banque Lehman Brothers (Lehman Brothers, USA)
UBAF (UBAC, NL)
Chase Manhattan (Chase Manhattan, USA)
Westdeutsche Landesbank-France (WLG, Ger)
CitiBank (Citybank, USA)

Insurance

Allianz (Ger)
Generali France (Generali, ITA)
Commercial Union-France (Commercial Union, GB)
Societe Suisse-France (Societe Suisse, SWIZ)

Services

Manpower France (Manpower, USA)
Bis (Vendex, NL)
McDonald's France (McDonald's, USA)
Eurest France (Compass, UK)
Danzas (Danzas, SWIZ)
Abilis (Vendex, NL)
IBM Global Services (IBM, USA)
ADP-GSI (ADP, USA)
Adia France (Adia International, SWIZ)
Simotra (Brambles, USA)
Air Liberte (British Airways, GB)
TAT(British Airways, GB)
Sun Microsystems-France (Sun, USA)
Vedior (Vendex, NL)
Blenheim (Miller Freeman, USA)
Avis Fleet Services (GE Capital Corp., USA)
Hertz France (Hertz, USA)
Lease Plan France (Lease Plan, NL)
Price Waterhouse (Price Waterhouse, USA)
Ogilvy et Mather (Ogilvy, USA)

Source: L'Usine Nouvelle - October 1998, Paris France

XI. U.S. AND COUNTRY CONTACTS: APPENDIX E

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U.S.-BASED MULTIPLIERS RELEVANT FOR COUNTRY

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COUNTRY GOVERNMENT AGENCIES

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Mr. Didier Lombard
French Roving Ambassador for Foreign Investments
Ministere de l'Economie et des Finances
139, rue de Bercy
75572 Paris Cedex 12
France
Tel: (33) 1.44.87.70.21
Fax: (33) 1.44.87.70.26
E-mail: didier.lombard@dii.finances.gouv.fr

FRENCH INDUSTRIAL DEVELOPMENT AGENCY - D.A.T.A.R

Mr. Michel Viger, Executive Director - Foreign Investments
28, rue Docteur Finlay
75015 Paris
France
Tel: (33) 1.44.37.05.80

Fax: (33) 1.44.37.05.90
E-mail: ifn@investinfrance.org
Internet: <http://www.investinfrance.org>

AGENCY FOR CORPORATE DEVELOPMENT OF ILE DE FRANCE
Mr. Hervé Moreels, Managing Director
94bis, avenue de Suffren
75015 Paris
France
Tel: (33) 1.53.85.62.00
Fax: (33) 1.53.85.62.09
E-mail: info@invest-iledefrance.org
Internet: <http://www.invest-iledefrance.org>

Most regions have local economic development agencies.
For more information, consult with the Commercial Service France,
Tel: 33 (1) 43.12.22.22; Fax: (33) 1.43.12.21.72

FRENCH STATISTICAL INSTITUTE
INSEE INFOS SERVICES
Tour Gamma A
195, rue de Bercy
75582 Paris Cedex 12
France
Tel: (33) 1.41.17.50.50
Fax: (33) 1 53.17.88.09
Internet: <http://www.insee.fr>

FRENCH CUSTOMS
Ministère de l'Economie, des Finances et de l'Industrie
Centre de Renseignements des Douanes
Statistics:
23, rue de l'Université
75700 Paris 07SP
France
Tel: (33) 1.55.04.65.10
Duties:
84, rue d'Hauteville
75010 Paris
Tel: (33) 1.53.24.68.24
Fax: (33) 1.53.24.68.30
Internet: <http://www.finances.gouv.fr/douanes>

FRENCH FOREIGN INVESTMENT CONTROL AGENCY
Ministere de l'Economie, des Finances et des Industries
Direction du Tresor
Service des Participations et Financements
Sous-Direction D des Financements
Bureau D3 Investissements Etrangers en France
Teledoc 564
139, rue de Bercy
75572 Paris Cedex 12
France
Tel: (33) 1.44.87.72.85
Fax: (33) 1.55.78.86.85

Internet: <http://www.finances.gouv.fr>

FRENCH NATIONAL TESTING LABORATORY - L.N.E.

Mr. Bryden, Director

1, rue Gaston-Boissier

75015 Paris

France

Tel: (33) 1.40.43.37.00

Fax: (33) 1.40.43.37.37

Or

Gilbert Revise, Departement Head (electric/acoustic)

29, avenue Roger Hennequin

78197 Trappes Cedex

Tel: (33) 1.30.69.10.00

Fax: (33) 1.30.69.12.34

Internet: <http://www.lne.fr>

OFFICIAL GAZETTE - J.O.

Mr. Jean-Paul Bolufer, Director

26, rue Desaix

75727 Paris Cedex 15

France

Tel: (33) 1.40.58.75.00

Fax: (33) 1.45.79.17.84

E-mail: info@journal-officiel.gouv.fr

Internet: <http://www.journal-officiel.gouv.fr>

NATIONAL AGENCY FOR THE VALORIZATION OF RESEARCH - ANVAR

Mr. François Gérard, Director

43, rue Caumartin

75436 Paris Cedex 09

France

Tel: (33) 1.40.17.83.00

Fax: (33) 1.49.24.96.21

Internet: <http://www.anvar.fr>

NATIONAL FRENCH STANDARDS ASSOCIATION - AFNOR

Mr. Bernard Vaucelle, General Manager

Tour Europe

92049 Paris-La Defense

France

Tel: (33) 1.42.91.55.55

Fax: (33) 1.42.91.56.56

Internet: <http://www.afnor.fr>

NATIONAL INSTITUTE OF INDUSTRIAL PROPERTY - INPI

Mrs. Agnes Marcade Head of Legal Affairs

26 bis, rue de Saint Petersburg

75800 Paris Cedex 08

France

Tel: (33) 1.53.04.57.19

Fax: (33) 1.43.87.74.68

Internet: <http://www.inpi.fr>

Note: The Commercial Service and the Office of Agricultural Affairs at

the American Embassy in Paris maintain an up-to-date listing of French Government contacts by Ministry and subject matter.

COUNTRY TRADE ASSOCIATION/CHAMBERS OF COMMERCE

Chambers of Commerce:

AMERICAN CHAMBER OF COMMERCE IN FRANCE

Mr. Stephen B. Pierce, Director
21, avenue George V
75008 Paris
France
Tel: (33) 1.40.73.89.90
Fax: (33) 1.47.20.18.62
E-mail: amchamfr@amchamfr.com
Internet: <http://www.amchamfr.com>

CHAMBER OF COMMERCE AND INDUSTRY OF PARIS - CCIP

Ms. Delorme, North America Desk Officer
2, rue de Viarmes
75001 Paris
France
Tel: (33) 1.55.65.35.68
Fax: (33) 1.55.65.36.92
Internet: <http://www.ccip.fr>

CHAMBER OF COMMERCE AND INDUSTRY OF VAL D'OISE - YVELINES

Mr. Jean-Francois Marmey, Director, International Trade
21, avenue de Paris
78021 Versailles Cedex
France
Tel: (33) 1.30.84.78.96
Fax: (33) 1.30.84.73.87
Internet: <http://www.cciv.net>
Or <http://www.cciv-online.com>

FRANCO-AMERICAN CHAMBER OF COMMERCE

Mrs. Claudine Serre, Director, French Chapter
104, rue de Miromesnil
75008 Paris
France
Tel: (33) 1.53.89.11.00
Fax: (33) 1.53.89.11.09
E-mail: cserre@faccparisfrance.com

Each district in France has a Chamber of Commerce and Industry.
For more information, consult with the Commercial Service France,
Tel: (33) 1.43.12.21.97; Fax: (33) 1.43.12.21.72

Trade Associations:

IMPORTERS' ASSOCIATION FOR MECHANICS AND ELECTRONICS
Federation des Entreprises Industrielles et Commerciales
Internationales de la Mecanique et de l'Electronique (FICIME)
Mr. Jean-Marie Salva, General Manager
25-27, rue d'Astorg
75008 Paris
France
Tel: (33) 1.44.51.14.60
Fax: (33) 1.42.65.39.49
E-mail: info@ficime.fr
Internet: <http://www.ficime.fr>

FRENCH EMPLOYERS ASSOCIATION
Mouvement des entreprises de France (MEDEF)
Mr. Stephane Witkowski, American Desk Officer
31, avenue Pierre 1er de Serbie
75784 Paris Cedex 16
France
Tel: (33) 1.40.69.44.44
Fax: (33) 1.47.23.47.32
Internet: <http://www.medef.fr>

APPLIANCE MANUFACTURERS' ASSOCIATION
Groupement Interprofessionnel des Fabricants d'Appareils d'Equipement
Menager (GIFAM)
Mr. Christian Brabant, President
39, avenue d'Iena
75783 Paris Cedex 16
France
Tel: (33) 1.53.23.06.53
Fax: (33) 1.47.20.20.73
Internet: <http://www.gifam.fr>

AUTOMOTIVE EQUIPMENT INDUSTRY ASSOCIATION
Federation des Industries des Equipements pour Vehicules (FIEV)
Mr. Amaury Halna Du Fretay, President
Mr. Raymond Guaisco, Director
79, rue J.J. Rousseau
92150 Suresnes
France
Tel: (33) 1.46.25.02.30
Fax: (33) 1.46.97.00.80
E-mail: fiev@fiey.fr
Internet: <http://www.fiev.fr>

BAKERY EQUIPMENT INDUSTRY ASSOCIATION
Union des Fabricants d'Equipements pour la Boulangerie et Patisserie
(UFFEB)
Mr. Roger Messio, President
Mr. Jean-Paul Broutin, Secretary
13, rue Saint-Lazare
75009 Paris
France
Tel: (33) 1.55.07.82.22
Fax: (33) 1.42.85.29.00

E-mail: contact@uffeb.com
Internet: <http://www.uffeb.com>

BUILDING MATERIALS AND QUARRIES INDUSTRY ASSOCIATION
Union Nationale des Industries de Carrieres et Materiaux de
Construction (UNICEM)
Mr. Xavier Salmon-Legagneur, President
3, rue Alfred-Roll
75849 Paris Cedex 17
France
Tel: (33) 1.44.01.47.01
Fax: (33) 1.47.63.26.90

BUSINESS GIFTS PROFESSIONALS UNION
Syndicat des Producteurs de Cadeaux d'Affaires
Mr. Jean Paoli, President
34, boulevard Haussmann
75009 Paris
France
Tel: (33) 4.72.83.00.60
Fax: (33) 4.72.83.00.61
E-mail: info@syprocal.fr
Internet: <http://www.syprocal.fr>

CHEMICAL INDUSTRY ASSOCIATION
Union des Industries Chimiques
Mr. Deleuze, President
Mr. Pierre Laroche, Project Officer
14, rue de la Republique
92800 Puteaux
France
Tel: (33) 1.46.53.11.00
Fax: (33) 1.46.53.11.05
E-mail: uicgeneral@uic.fr
Internet: <http://www.uic.fr>

CYCLE MANUFACTURERS ASSOCIATION
Conseil Nationale de Profession du Cycle
Mr. Alain Goutzmann, General Manager
79, rue J.J. Rousseau
92150 Suresnes
France
Tel: (33) 1.46.25.02.35
Fax: (33) 1.40.99.06.20

FARM MACHINERY INDUSTRY ASSOCIATION
Syndicat General des Constructeurs de Tracteurs et Machines Agricoles
(SYGMA)
Mr. Bruno Morange, President
Mr. Dominique Opillard, International Trade
19, rue Jacques Bingen
75017 Paris
France
Tel: (33) 1.42.12.85.90
Fax: (33) 1.40.54.95.60

FEDERATION OF ELECTRIC AND ELECTRONIC INDUSTRIES
Federation des Industries Electriques, Electroniques et des
Communications (FIEE)
Mr. François Mauduit, President
11-17, rue Hamelin
75783 Paris Cedex 16
France
Tel: (33) 1.45.05.70.70
Fax: (33) 1.45.53.03.93
Internet: <http://www.fieec.fr>

FRENCH FEDERATION OF JEWELRY, GOLDSMITHING, GIFTS, DIAMONDS, GEMS,
PEARLS AND RELATED ACTIVITIES
Federation Francaise de la Bijouterie, Joaillerie, Orfevriere, du
Cadeau, des Diamants, Pierres et Perles et Activites qui s'y rattachent
Mr. Didier Roux, President
58, rue du Louvre
75002 Paris
France
Tel: (33) 1.40.26.98.00
Fax: (33) 1.40.26.29.51
Internet: <http://www.bjo-france.com>

FRENCH FEDERATION OF TOY INDUSTRIES
Federation Francaise des Industries du Jouet/Puericulture
Mr. Daniel Aboaf, Managing Director
103, rue Lafayette
75481 Paris Cedex 10
France
Tel: (33) 1.40.16.25.70
Fax: (33) 1.40.16.25.71
E-mail: FJP@wanadoo.fr

FRENCH FISHING EQUIPMENT INDUSTRY ASSOCIATION
Groupement d'Industrie Francaise d'Articles de Pêche
Mr. Hughes Nello, President
17, rue Arnoux
92340 Bourg-la-Reine
Tel: (33) 1.47.02.96.01
Fax: (33) 1.40.91.03.24

FRENCH INTERNATIONAL TRADE ASSOCIATION
Confederation Francaise du Commerce de Gros Interentreprises et du
Commerce
International (CGI)
Mr. Guy Laporte, President
31, avenue Pierre-ler-de-Serbie
75784 Paris Cedex 16
France
Mailing address:
18, rue des Pyramides
75001 Paris
France
Siege administratif (Administrative office) :

Tel: (33) 1.44.55.35.00
Fax: (33) 1.42.86.01.83
E-mail: cgi@cgi-cf.com
Internet: <http://www.cgi-cf.com>

FRENCH AERONAUTIC AND SPACE INDUSTRY ASSOCIATION
Groupement des Industries Francaises Aeronautiques et Spatiales (GIFAS)
Mr. Jean-Paul Bechat, President
4, rue Galilee
75782 Paris Cedex 16
France
Tel: (33) 1.44.43.17.00
Fax: (33) 1.40.70.91.41
E-mail: infogifas@gifas.assos.fr
Internet: <http://www.gifas.asso.fr>

FRENCH AUTOMOBILE MANUFACTURERS COMMITTEE
Comite des Constructeurs Francais d'Automobiles
Mr. De Belabre, President
2, rue de Presbourg
75008 Paris
France
Tel: (33) 1.49.52.51.00
Fax: (33) 1.47.23.74.73
Internet: <http://www.ccfa.fr>

GAS AND PETROLEUM INDUSTRY ASSOCIATION
Groupement des Entreprises Parapetrolieries et Paragazieres (GEP)
Mr. Pierre Dupal, President
45, rue Louis Blanc
92038 Paris La Defense Cedex
France
Tel: (33) 1.41.17.67.37
Fax: (33) 1.47.17.67.47

LABORATORY EQUIPMENT INDUSTRY ASSOCIATION
Chambre Syndicale des Fabricants et Negociants d'Appareils de
Laboratoire (FABRILABO)
Mr. Francis Pithon, President
39-41, rue Louis Blanc
92038 Paris La Defense Cedex
France
Tel: (33) 1.47.17.63.97
Fax: (33) 1.47.17.63.98

MEASURING AND CONTROL EQUIPMENT INDUSTRY ASSOCIATION
Syndicat de la Mesure
Mr. Charles Michel Gouge, President
39-41, rue Louis Blanc
92400 Courbevoie
France
Tel: (33) 1.43.34.76.80/81
Fax: (33) 1.43.34.76.82/83
E-mail: mesure@club-internet.fr

MECHANICAL ENGINEERING INDUSTRIES ASSOCIATION
Federation des Industries de la Mecanique (FIM)
Mr. Marc Bay, Director
39-41, rue Louis Blanc
92400 Courbevoie
Mailing address:
92038 Paris La Defense Cedex
France
Tel: (33) 1.47.17.60.00
Fax: (33) 1.47.17.64.99
E-mail: bmoreldeville@mail.fimeca.com

MEDICAL INDUSTRY ASSOCIATION
Syndicat National de l'Industrie des Technologies Medicales (SNITEM)
Mr. Dumont, President
39-41, rue Louis Blanc
92400 Courbevoie
Mailing address:
92038 Paris La Defense Cedex
France
Tel: (33) 1.47.17.63.88
Fax: (33) 1.47.17.63.89
Internet: www.snitem.fr

MINERALS AND NON-FERROUS METALS INDUSTRY ASSOCIATION
Federation des Chambres Syndicales des Minerais, Mineraux industriels
et des Metaux non Ferreux
Mr. Jean Chouvel, President
30, avenue de Messine
75008 Paris
France
Tel: (33) 1.45.63.02.66
Fax: (33) 1.45.63.61.54
E-mail: fmmnfx@aol.com

MOTION PICTURE INDUSTRY ASSOCIATION
Federation du Spectacle
Mr. Jean Voirin, Secretary-General
14-16, rue des Lilas
75019 Paris
France
Tel: (33) 1.48.03.87.60
Fax: (33) 1.42.40.90.20

NATIONAL UNION OF PRODUCT ADVERTISING
Syndicat National de la Publicite par l'Objet
Mr. Thierry Bertrand, President
15, rue de Chateaudun
75009 Paris
France
Tel: (33) 1.48.78.75.98
Fax: (33) 1.45.26.25.39

NATIONAL BUILDING FEDERATION
Federation Nationale du Batiment

Mr. Sionneau, President
33, avenue Kleber
75784 Paris Cedex 16
France
or
6-14, rue La Perouse
75016 Paris
France
Tel: (33) 1.40.69.51.00
Fax: (33) 1.45.53.58.77
Internet: www.ffbatiment.fr

NATIONAL FEDERATION OF PUBLIC WORKS
Federation Nationale des Travaux Publics (FNTP)
Mr. Daniel Tardy, President
3, rue de Berri
75008 Paris
France
Tel: (33) 1.44.13.31.10
Fax: (33) 1.44.13.31.44

NATIONAL CONFEDERATION WOOD INDUSTRY FOR CONSTRUCTION
Union des Industries du Bois
Mr. Jean-Daniel Debange, President
33, rue de Naples
75008 Paris
France
Tel: (33) 1.53.42.15.50
Fax: (33) 1.53.42.15.51

NATIONAL ASSOCIATION OF HOME REPAIR AND RELATED HOBBIES
Union Nationale des Industries de Bricolage et jardinage
Mr. Caille, President
61, rue de l'Arcade
75008 Paris
France
Tel: (33) 1.53.42.36.42
Fax: (33) 1.42.93.26.62
Internet: www.unibal.com

NATIONAL UNION OF FRENCH FURNITURE INDUSTRIES (UNIFA)
Union Nationale des Industries Francaises de l'Ameublement
Mr. Henri Griffon, President
28 bis, avenue Daumesnil
75012 Paris
France
Tel: (33) 1.44.68.18.00
Fax: (33) 1.44.74.37.55
Internet: www.meuble-france.com

NATIONAL WOOD FEDERATION
Federation Nationale d'Exploitants Forestiers, Scieurs du Bois
Mr. Dominique Juillot, President
6, rue François Ier
75008 Paris

France
Tel: (33) 1.56.69.52.00
Fax: (33) 1.56.69.52.09
Internet: www.fnbois.com

NAUTICAL INDUSTRY FEDERATION
Federation des Industries Nautiques
Mrs. Annette Roux, Chief Representative
Port de Javel-haut
75015 Paris
France
Tel: (33) 1.44.37.04.00
Fax: (33) 1.45.77.21.88
Internet: www.france-nautic.com

OPTICAL INDUSTRY ASSOCIATION
Groupement des Industries Francaises de l'Optique (GIFO)
Mr. Bertrand de Lime, President
39-41, rue Louis Blanc
92400 Courbevoie
Mailing address:
92038 La Defense Cedex
France
Tel: (33) 1.47.17.64.00
Fax: (33) 1.47.17.63.98
Internet: www.gifo.org

PAINTS & INKS INDUSTRY ASSOCIATION
Federation des Industries des Peintures, Encres, Couleurs, Colles et
Adhesives (FIPEC)
Mr. Michel Magnan, President
42, avenue Marceau
75008 Paris
France
Tel: (33) 1.53.23.00.00
Fax: (33) 1.47.20.90.30
Internet: www.fipec.org

PAPER, CARDBOARD, CELLULOSE INDUSTRY ASSOCIATION
Confederation Francaise de l'Industrie des Papiers, Cartons et
Celluloses (COPACEL)
Mr. Jean-Pierre Quéré, President
154, boulevard Haussmann
75008 Paris
France
Tel: 33 (1) 53.89.24.00
Fax: 33 (1) 53.89.24.01
Internet: www.copacel.fr

PERFUME INDUSTRY ASSOCIATION
Federation des Industries de la Parfumerie (FIP)
Mr. Alain Grangé-Cabane, President
33, avenue des Champs-Élysées
75008 Paris
France

Tel: (33) 1.56.69.67.89
Fax: (33) 1.56.69.67.90

PHARMACEUTICAL INDUSTRY ASSOCIATION

Federation Francaise des Industries du Medicament (FEFIM)

Mr. Bernard Mesure, President

88, rue de la Faisanderie

75782 Paris Cedex 16

France

Tel: (33) 1.45.03.88.61

Fax: (33) 1.45.04.07.98

Internet: www.snip.fr

PHOTOGRAPHIC AND VIDEO EQUIPMENT INDUSTRY ASSOCIATION

Syndicat des Equipements Photographiques et de l'Image (SEPIM)

Mr. Serge Crasniansky, President

5 bis, rue Jacquemont

75017 Paris

France

Tel: (33) 1.40.25.96.65

Fax: (33) 1.42.29.02.22

E-mail: ffii@wanadoo.fr

PLASTIC TRANSFORMERS FEDERATION

Federation de la Plasturgie

Mr. Emmanuel Paturle, President

65, rue de Prony

75854 Paris Cedex 17

France

Tel: (33) 1.44.01.16.16

Fax: (33) 1.44.01.16.55

Internet: www.proplast.org

PRINTING AND GRAPHIC ARTS FEDERATION

Federation de l'Imprimerie et de la Communication Graphique (FICG)

Mr. Jacques Schor, President

68, boulevard St. Marcel

75005 Paris

France

Tel: (33) 1.44.08.64.46

Fax: (33) 1.43.36.09.51

E-mail: ficg@ficg.fr

PROFESSIONAL UNION OF PLASTICS MANUFACTURERS

Syndicat des Producteurs de Matiere Plastique

Mr. Dominique Huillard, President

14, rue de la République

92800 Puteaux

France

Tel: (33) 1.46.53.10.53

Fax: (33) 1.46.53.10.73/10.75

Internet: www.proplast.org/spmp

RAILROAD INDUSTRY FEDERATION

Federation des Industries Ferroviaires

Mr. Jacques Douffiagues, President
12, rue Bixio
75007 Paris
France
Tel: (33) 1.45.56.13.53
Fax: (33) 1.47.05.29.17
Internet: www.fif.asso.fr

SHIP BUILDERS UNION
Chambre Syndicale des Constructeurs de Navires
Mr. Alain Grill, President
47, rue de Monceau
75008 Paris
France
Tel: (33) 1.53.89.52.00
Fax: (33) 1.53.89.52.15

SPORTING GOODS INDUSTRY ASSOCIATION
Federation Francaise des Industries du Sport et des Loisirs (FIFAS)
Mr. Roger Pascale, President
Ms. Nicole Berthier-Stoops, Managing Director
18, rue Kurnonsky
Paris 75017
France
Tel: (33) 1.47.31.56.23
Fax: (33) 1.47.31.56.32
E-mail: fifas@club-internet.fr

STATIONERY PRODUCERS' UNIONS
Federation des Articles de Papeterie
Mr. Francois Nusse, President
71, avenue Marceau
75116 Paris
France
Tel: (33) 1.47.20.90.12
Fax: (33) 1.49.52.05.88

STATIONERY AND OFFICE PRODUCTS ASSOCIATION
Association Francaise d'Articles de Papeterie et des Fournitures de Bureau
Mr. Franck Toffa, President
12, rue des Pyramides
75001 Paris
France
Tel: (33) 1.42.60.11.59
Fax: (33) 1.42.60.12.03

TELECOMMUNICATION INDUSTRY UNION
Groupement des Industries de Telecommunications et d'Electronique Professionnelle (GITEP)
Mr. Noël Claveloux, President
Mr. Antoine Weil, Chief Representative
17, rue Hamelin
75783 Paris Cedex 16
France

Tel: (33) 1.45.05.71.97
Fax: (33) 1.47.55.66.22
Or (33) 1.45.53.09.23
Internet: www.gitep.fr

TEXTILE INDUSTRY UNION
Union des Industries Textiles
Mr. Georges Jolles, President
37-39, rue de Neuilly
92110 Clichy
Tel: (33) 1.47.56.31.21
Fax: (33) 1.47.30.25.28
Internet: www.gitep.fr

UNION OF PLASTIC AND RUBBER INDUSTRY DISTRIBUTORS
Union pour Industries et de la Distribution des Plastiques et du
Caoutchouc (UCAPLAST)
Mr. Jean Peyronnet, President
1, square La Bruyere
75009 Paris
France
Tel: (33) 1.42.82.10.22
Fax: (33) 1.42.80.55.45

VETERINARIAN DRUG INDUSTRY ASSOCIATION
Syndicat de l'Industrie du Medicament Veterinaire (SIMV)
Mr. Jacques Cuvellier, President
109, boulevard Haussman
75008 Paris
France
Tel: (33) 1.53.30.04.00
Fax: (33) 1.53.30.06.05
Internet: www.simv.org

Note: This list is not exhaustive. The Commercial Service at the
American Embassy in Paris maintains an up-to-date and comprehensive
listing of industry associations.

COUNTRY MARKET RESEARCH FIRMS

A.C. NIELSEN
Mr. Louis Courtot
9, avenue des 3 Fontaines
95007 Cergy Pontoise
France
Tel: (33) 1.34.41.44.44
Fax: (33) 1.30.38.60.77

ADEGE
Mr. G. Saurais, President
10, rue des Marronniers
69002 Lyon
France
Tel: (33) 4.72.77.81.40

Fax: (33) 4.72.77.81.41
Internet: www.adege.fr

ALGOE

Mr. Debrinay, President
Mr. Grolleau, Vice-president
9 bis, route de Champagne
69134 Ecuilly Cedex
France
Tel: (33) 4.72.18.12.00
Fax: (33) 4.72.18.13.90

ARTHUR D. LITTLE FRANCE

Mr. Eric Belot, President and Managing Director
50, avenue Théophile Gaultier
75016 Paris
France
Tel: (33) 1.55.74.29.00
Fax: (33) 1.55.74.28.00
Internet: www.arthurdlittle.com

AVISO CONSEIL

Mr. B. Vincent, President and Managing Director
11, quai Rambaud
69002 Lyon
France
Tel: (33) 4.72.41.16.20
Fax: (33) 4.78.42.16.10

B.V.A (Brule Ville Associates)

Mr. Chapot, Director
191, avenue du General Leclerc
78200 Viroflay
France
Tel: (33) 1.30.84.88.00
Fax: (33) 1.30.84.88.01
Internet: www.bva.fr

CATHERINE DELANNOY & ASSOCIATES

Mrs. G. Delannoy
29, rue de Miromesnil
75008 Paris
France
Tel: (33) 1.42.65.27.42
Fax: (33) 1.47.42.25.89

CEGOS

Mr. Coquenel, General Manager
Tour Chenonceaux
204, rond point de Pont de Sevres
92516 Boulogne Billancourt Cedex
France
Tel: (33) 1.46.20.63.03
Fax: (33) 1.46.20.88.60
Internet: www.egos.fr

E.S.O.P.
Ms. Morgensztern
92, avenue d'Ivry
75013 Paris
France
Tel: (33) 1.44.24.20.60
Fax: (33) 1.45.85.24.93
E-mail: esop-survey@magic.fr

E.S.T.E.L.
Ms. J. Poulton
1, rue Alsace Lorraine
94140 Alfortville
France
Tel: (33) 1.43.96.01.12
Fax: (33) 1.43.96.02.01

GROUPE MV2
Mr. Fernand, President
89, avenue Aristide Briand
92120 Montrouge
France
Tel: (33) 1.46.73.31.31
Fax: (33) 1.46.73.31.60

Note: The Commercial Service and the Office of Agricultural Affairs at the American Embassy in Paris maintain current and comprehensive listing of market research firms. As functions, contacts, and assigned responsibilities change often, interested exporters are requested to direct specific inquiries to the Commercial Service or to the Office of Agricultural Affairs at the American Embassy in Paris for up-to-date references.

COUNTRY COMMERCIAL BANKS

French Subsidiaries of U.S. Banks:

AMERICAN EXPRESS INTERNATIONAL BANKING CORPORATION
Mr. Piero Grandi, President, Managing Director
11, rue Scribe
75009 Paris
France
Tel: (33) 1.47.14.50.00
Fax: (33) 1.47.14.07.04

BANK OF AMERICA
Mr. Odon de Vienne, President, Managing Director
43-47, avenue de la Grande Armee
75782 Paris Cedex 16
France
Tel: (33) 1.45.02.68.00
Fax: (33) 1.45.01.77.89

BANK OF NEW-YORK

Mrs. Deidre Perroux, President, Managing Director
13, 15, boulevard de la Madeleine
75009 Paris
France
Tel: (33) 1.42.97.90.20
Fax: (33) 1.42.97.43.73

CHASE MANHATTAN BANK SA

Mr. Jean-Olivier Bartholin, General Manager
40-42, rue de Washington
75008 Paris
France
Tel: (33) 1.53.77.10.00
Fax: (33) 1.53 77 10 50
Or (33) 1.53 77 14.49

CITIBANK

Mr. Jean-Claude Gruffet, General Manager
Citicenter, 19 Le Parvis
92073 Paris La-Defense Cedex 36
France
Tel: (33) 1.49.06.14.15
Fax: (33) 1.47.67.14.17
Internet: www.citibank.com

MORGAN GUARANTY TRUST CO OF NEW-YORK

Mr. Philippe Lagayette, President, Managing Director
14 Place Vendome
75001 Paris
France
Tel: (33) 1.40.15.45.00
Fax: (33) 1.40.15.41.36

REPUBLIC NATIONAL BANK OF NEW-YORK

Mr. Robert Sevrin, Managing Director
20, place Vendome
75001 Paris
France
Tel: (33) 1.44.86.18.61
Fax: (33) 1.42.60.05.62

French and other Foreign Banks:

ASSOCIATION FRANCAISE DES BANQUES - AFB

Mr. Michel Freyche, President
18, rue Lafayette
75440 Paris Cedex 09
France
Tel: (33) 1.48.00.52.52
Fax: (33) 1.42.46.76.40
Internet: www.afb.fr

The Commercial Service at the American Embassy in Paris maintains an up-to-date and comprehensive listing of commercial banks.

XII: MARKET RESEARCH AND TRADE EVENTS

APPENDIX F : MARKET RESEARCH

UPCOMING DOC INDUSTRY MARKET BRIEFS (MB)

- PROCESSED FOOD - MARKET BRIEF - NOV. 99
- AGRICULTURAL CHEMICALS - MB - DEC. 99
- AGRICULTURAL MACHINERY - MB - FEB. 00
- COMPOSITE MATERIALS - MB - MAR. 00
- MACHINE TOOLS - MB - MAY 00
- FOOD PACKAGING EQUIPMENT - MB - NOV. 99
- OIL DRILLING AND PRODUCTION EQUIPMENT - MB - FEB. 00
- AUTOMOBILE GARAGE EQUIPMENT - MB - OCT. 99
- AUTOMOBILE ORIGINAL EQUIPMENT - MB - OCT. 99
- AUTOMOBILE AFTERMARKET - MB - OCT. 99
- CONSTRUCTION EQUIPMENT - MB - OCT. 99
- CONSTRUCTION MATERIALS - MB - OCT. 99
- REGIONAL/BUSINESS AIRCRAFT & PARTS - MB - APR. 00
- AIRPORT DEVELOPMENT OPPORTUNITIES - MB - MAY 00
- THE FRENCH FRANCHISING MARKET - MB - MAY 00
- THE IN LINE SKATE MARKET - MB - MAR. 00
- TRAVEL AND TOURISM SERVICES - MB - MAY 00
- INTELLECTUAL PROPERTY RIGHTS FOR SOFTWARE/HARDWARE - MB - MAR. 00
- EXPANSION OF INTRANET AMONG FRENCH CORPORATIONS - MB - AUG. 00
- HEALTH CARE SERVICES - MB - SEP. 00
- CALL CENTERS - MB - JUL. 00
- ELECTRONIC COMMERCE - MB - SEP. 00
- BIOTECHNOLOGY: ANALYTICAL AND DIAGNOSTIC EQUIPMENT - MB - AUG. 00

AVAILABLE DOC INDUSTRY MARKET INSIGHTS (IMI 99)

- INTERNATIONAL LONG-HAUL FLIGHTS TO BE PROHIBITED AT ORLY
- WOMEN'S WEAR TRADE SHOW
- LYON MODE CITY (LINGERIE AND SWIMWEAR TRADE SHOW)
- FRANCE: NUMBER ONE TOURIST DESTINATION IN THE WORLD
- BAE AND DASA TO FORM EUROPEAN DEFENSE GIANT
- NEW AIRPORT FOR NICE
- INDUSTRY PROFILE OF SW OF FRANCE REGION MIDI PYRENEES
- INDUSTRY PROFILE OF SW OF FRANCE REGION AQUITAINE
- INTERSELECTION TRADE SHOW
- FRENCH INFANT AND CHILDREN ACCESSORIES INDUSTRY
- FRENCH MEDIA CONTACTS/TOURISM ORIENTED
- FURNITURE TRADE SHOW
- CHILDREN'S WEAR TRADE SHOW
- WHO'S WHO IN THE FRENCH TRAVEL INDUSTRY
- MASTER FRANCHISE IN FRANCE

- COMMERCE EXTERIEUR
- POLLUTEC TRADE SHOW
- AMERICAN FIRMS DOMINATE THE FRENCH SOFTWARE MARKET
- EITO SURVEY ON E-COMMERCE
- ENCRYPTION
- FRANCE'S SOFTWARE SERVICES FIRMS IN EXCELLENT HEALTH
- JAVA LANGUAGE & EXPANSION OF THE INTERNET
- FRANCE'S TEN FACILITIES MANAGEMENT FIRMS
- SECURE PAYMENT TRANSACTIONS ON THE INTERNET
- SIX US FIRMS DOMINATE THE FRENCH MARKET
- THE 40 LARGEST SOFTWARE SERVICES IN FRANCE
- THE COMPUTER PRINTER MARKET IN FRANCE
- THE FRENCH IT MARKET
- THE FRENCH MARKET FOR COMPUTER MONITORS
- THE FRENCH MARKET FOR COMPUTER SERVICES
- THE INTERNET AMONG LARGE FRENCH CORPORATIONS
- Y2K BUG AND SMALL-TO-MEDIUM FIRMS
- THE FRENCH TOY MARKET
- MUSICORA/MUSICMANIA 1999
- INTERSELECTION TRADE SHOW
- THE NEW INTERNET PACKAGE DEAL
- OPENING OF THE TELECOMMUNICATIONS MARKET IN FRANCE
- EUTELSAT ACCELERATES PRIVATIZATION BY JULY 2001
- PRICING PROCEDURES FOR MEDICAL DEVICES
- CE MARK - MEDICAL DEVICES - FRANCE
- ITMA'99 (INTERNATIONAL EXHIBITION OF TEXTILE MACHINERY)
- TELECOMMUNICATIONS COMPANIES IN MARSEILLE
- HOPITAL EXPO MERGES WITH INTERMEDICA

Note: DOC Industry Market Insights (IMI) for 1997 - 1998 available on NTDB

APPENDIX G - TRADE EVENT SCHEDULE

DATE	TRADE SHOW / INDUSTRY
CITY	ORGANIZER
FACSIMILE	TELEPHONE
9/3-6/99 Paris	WHO'S NEXT (3) / Fashion For 15-25-yr. Olds Urban Shown SA T: (33)1.40.13.74.74/ F: (33)1.40.13.74.84
9/3-6/99 Paris	PRET-A-PORTER (3) / Women's Fashion Wear SODES T: (33)1.44.94.70.00/ F: (33)1.44.94.70.05
9/3-7/99 Paris	MAISON & OBJET (3) / Home Decoration SAFI T: (33)1.44.29.02.00/ F: (33)1.44.29.02.01
9/4-6/99 Paris	LYON MODE CITY (1) / Lingerie & Swimwear Federation de la Maille T: (33)1.47.56.32.32/ F: (33)1.47.56.32.99
9/8-13/99 Cannes	PLAISANCE / Boating SEPA T: (33)1.42.89.41.04/ F: (33)1.45.61.12.00
9/14-17/99 Rennes	SALON DE LA PRODUCTION ANIMALE / Livestock Production SPACE T: (33)2.99.67.10.20/ F: (33)2.99.67.78.45
9/15-17/99 Paris	NETWORLD + INTEROP / Network Computing Softbank expo T: (33)1.46.39.56.56/ F: (33)1.46.39.56.99
9/21-24/99 Paris	POLLUTEC (1)/ Environment & Pollution Control Miller Freeman T: (33)1.47.56.21.15/ F: (33)1.47.56.21.20
9/30-10/3/99 Paris	PREMIERE VISION (3) / Cotton & Textile Premiere Vision Le Salon T: (33)4.72.60.65.00/ F: (33)4.72.60.65.09
10/13-18/99 Paris	EQUIP AUTO (1)(2)/ Automobile Cmt. Des Expo de Paris T: (33)1.49.09.61.41/F: (33)1.49.09.60.05
10/16-18/99 Paris	DIETEXPO (1)(2) / Health & Dietetic Organic Products OIP Reed T: (33)1.41.90.47.60/ F: (33)1.41.90.47.69

10/18-21/99 Paris	SATIS / Image & Sound Reed-OIP T: (33)1.41.90.48.45/ F: (33)1.41.90.48.39
10/30-11/11/99 Dijon	FOIRE INTERNATIONALE DE DIJON / Food & Beverages Parc Des Expo.Et Congres De Dijon T: (33)3.80.77.39.00/ F: (33)3.80.77.39.39
11/3-13/99 Paris	NAUTIQUE INTERNATIONAL / Boat Reed-OIP T: (33)1.41.90.47.10/ F: (33)1.41.90.48.39
11/6-8/99 Paris	PARTIR EN HIVER (1) / Winter Vacation Le Figaro Quorum Expo T: (33)1.56.69.50.80/ F: (33)1.56.69.50.94
11/8-13/99 Paris	BATIMAT (1)(2) / Building Construction & Materials MILLER FREEMAN Batimat Construction T: (33)1.47.56.51.02/ F: (33)1.47.56.08.18
11/12-14/99 Paris	FUNERAIRE (1)/ Funeral Services COSP T: (33)1.40.76.45.00/ F: (33)1.45.63.78.24
11/23-26/99 Paris	MIDEST / Industrial Subcontracting Miller Freeman T: (33)1.47.56.50.00/ F: (33)1.47.56.21.40
11/24-29/99 Montreuil	SALON DU LIVRE DE JEUNESSE / Books & Comics Reed-OIP T: (33)1.55.86.51.05/ F: (33)1.48.57.21.40
11/30-12/3/99 Paris	SIRCOM / Mobile Communications SIRCOM SA/Exposuim T: (33)1.49.68.51.85/ F: (33)1.49.68.51.78
12/99 Paris	EXPO CONGRES / Event Management & Incentives Infopromotions T: (33)1.44.39.85.00/ F: (33)1.45.44.30.40
12/1-3/99 Paris	SITM / Medical Equipment BIRP T: (33)1.53.17.11.40/ F: (33)1.53.17.11.45
12/4-12/99 Paris	PARIS HORSE SHOW / Horse, Poney & Donkey Cmt. Des Expositions de Paris T: (33)1.49.09.64.82/ F: (33)1.49.09.60.03
1/13-17/2000 Paris	MEUBLE DE PARIS / Furniture COSP T: (33)1.40.76.45.00/ F: (33)1.45.63.78.24

1/14-18/2000 Paris	MAISON & OBJET (3) / Home Decorations SAFI T: (33)1.44.29.02.00/ F: (33)1.44.29.02.01
1/26-28/2000 Paris	SIMD MARKETING DIRECT / Direct Marketing CEP Exposium T:(33) 1.49.68.51.00/ F: (33)1.47.37.75.09
1/28-31/2000 Paris	WHO'S NEXT (3) / Fashion For 15-25-yr. Olds Urban Shown SA T: (33)1.40.13.74.74/ F: (33)1.40.13.74.84
1/29-31/2000 Paris	GLISSEXPO / Winter Sports Paris Gliss' Promotion T:(33)5.59.42.51.51/ F: (33)1.59.42.51.59
1/29-31/2000 Paris	MODE ENFANTINE (3) / Children's Clothing Miller Freeman T: (33)1.43.12.26.98/ F: (33)1.43.12.21.72
2/14-18/2000 Cannes	MILIA (1) / Publishing & Media REED/MIDEM T: (33)1.41.90.44.80/ F: (33)1.41.90.44.70
2/16-18/2000 Angers	SALON INTERNATIONAL DU VEGETAL / Horticultural Products BHR Centre Regional Horticole T:(33)2.41.79.14.17/ F:(33)2.41.79.29.29
2/27-3/5/2000 Products Paris	SALON INTERNATIONAL DE L'AGRICULTURE / Agricultural Cmt. Des Expositions de Paris T: (33)1.49.09.60.00/ F: (33)1.49.09.61.58
2/23-27/2000 Paris	EXPOLANGUES / Living Languages, Cultures & Travel Reed-OIP T: (33)1.41.90.47.60/ F: (33)1.41.90.47.69
3/2-5/2000 Paris	CABLE AND SATELLITE TRADE SHOW / Telecommunications Reed Exhibitors T: (33)1.41.90.46.71/ F: (33)1.41.90.46.60
3/3-5/2000 Paris	PREMIERE VISION (3) / Cotton & Textile Premiere Vision Le Salon T: (33)4.72.60.65.00/ F: (33)4.72.60.65.09
3/5-8/2000 Grenoble	SIG / Winter Sporting Goods & Apparel ALPEXPO T: (33)4.76.39.66.00/ F: (33)4.76.09.36.48
3/10-12/2000 Lyon	MAHANA (1) / Travel & Tourism For General Public Quorum Expo T: (33)4.78.62.33.62/ F: (33)4.78.62.33.6
3/10-20/2000	FLORISSIMO 2000 (4) / Flowers & Plants

Dijon	Parc des Expo.et Congres de Dijon T: (33)3.80.77.39.00/ F: (33)3.80.77.39.39
3/17-27/2000 Tourism Lyon	FOIRE INTERNATIONALE DE LYON / Food, Beverages & SEPELCOM T: (33)4.72.22.32.64/ F: (33)4.72.22.32.82
3/17-20/2000 Paris	SALON DE LA FRANCHISE / Franchising Miller Freeman T: (33)1.47.56.24.22/ F:(33) 1.47.56.21.40
3/17-22/2000 Paris	SALON DU LIVRE / Book Publishing Reed-OIP T: (33)1.41.90.47.60/ F: (33)1.41.90.47.69
3/23-26/2000 Paris	SALON MONDIAL DU TOURISME (1) / Travel & Tourism CEP Exposium T: (33)1.49.68.54.50/ F: (33)1.49.68.54.51
3/14-17/2000 Paris	SITL / Transportation & Logistics Miller Freeman T: (33)1.47.56.52.79/ F: (33)1.47.56.08.68
3/21-24/2000 Paris	FIT (1) / Information Technology Dasar Expo T: (33)1.41.27.21.50/ F: (33)1.47.37.32.83
3/28-30/2000 Paris	IT COMDEX (1)/ Telecommunications & Computer Related Services INFOPROMOTIONS T: (33)1.44.39.85.00/ F: (33)1.45.44.30.40
3/28-30/2000 Technologies Paris	MICAD / Computer Graphics & Computer-Aided BIRP T: (33)1.53.17.11.40/ F: (33)1.53.17.11.45
3/28-30/2000 Paris	NETWORK & SYSTEMS MANAGEMENT / Network & Telecommunication Systems Infopromotions T: (33)1.44.39.85.00/ F: (33)1.45.44.30.40
4/10-14/2000 Cannes	MIP TV / TV Programing, TV, Film And Video REED MIDEM T: (33)1.41.90.45.80/ F: (33)1.41.90.45.70
4/18-20/2000 Paris	JEC (1)/ Composite Materials Centre Promo Composites T: (33)1.44.01.16.43/ F: (33)1.44.01.16.65
4/26-5/8/2000	FOIRE INTERNATIONALE DE PARIS / Food, Beverages &

Paris	Tourism Cmt. des Expositions de Paris T:(33)1.49.09.60.00/ F: (33)1.49.09.60.03
5/23-25/2000 Paris	SALON DE L'INTERNET / Internet Products & Services Groupe SPAT T: (33)1.45.57.30.48/ F: (33)1.45.54.23.86
5/27-6/7/2000 Bordeaux	FOIRE INTERNATIONALE DE BORDEAUX / Food & Beverages Cmt. des Expositions de Paris T:(33)5.56.11.99.00/ F: (33)5.56.11.99.99
6/20-22/2000 Paris	ETHNIC FOOD SHOW (1) / Ethnic & Speciality Foods Bercy-Expo T: (33)1.44.74.50.10/ F: (33)1.44.74.50.67
7/1-3/2000 Paris	MODE ENFANTINE (3) / Children's Clothing Miller Freeman T: (33)1.43.12.26.98/ F: (33)1.43.12.21.72
9/3-6/2000 Paris	PRET-A-PORTER (3) / Women's Fashion Wear SODES T: (33)1.44.94.70.00/ F: (33)1.44.94.70.05
9/1-11/2000 Strasbourg	FOIRE INTERNATIONALE DE STRASBOURG / Gastronomy & Wine SOFEX T: (33)3.88.37.21.21/ F: (33)3.88.37.37.95
9/6-11/2000 Cannes	PLAISANCE / Boating SEPA T: (33)1.42.89.41.04/ F: (33)1.45.61.12.00
9/15-25/2000	FOIRE INTERNATIONALE DE CAEN / Food, Beverages & Machinery Caen Fair Caen Expo Congress T: (33)2.31.29.99.99/ F: (33)2.31.29.99.60
9/21-23/2000 La Rochelle	RENCONTRES EUROPEENNES DU VEHICULE ELECTRIQUE / Electric Vehicles SEM Technoforum T: (33)5.46.45.90.90/ F: (33)5.46.44.04.07
9/22-10/2/2000 Marseille	FOIRE INTERNATIONALE DE MARSEILLE / Food, Beverages & Tourism SAFIM ORGANISATION T: (33)4.91.76.16.00/ F: (33)4.91.22.16.45
9/28-10/1/2000 Deauville	TOP RESA (1)/ Travel & Tourism Miller Freeman T: (33)1.47.56.50.00/ F: (33)1.47.56.50.67
9/30-10/15/2000 Paris	MONDIAL DE L'AUTOMOBILE (2) / Automobile AMC Promotion T: (33)1.56.88.22.40/ F: (33)1.47.23.06.30

10/5-8/2000 Paris	CABLE AND SATELLITE TRADE SHOW / Telecommunications Reed Exhibitors T: (33)1.41.90.46.71/ F: (33)1.41.90.46.60
10/17-20/2000 Lyon	POLLUTEC (1)/ Environment & Pollution Control Miller Freeman T: (33)1.47.56.21.15/ F: (33)1.47.56.21.20
10/22-26/2000 Paris	SIAL 2000 (1)(2) / Food Products CEP Exposium T: (33)1.49.68.54.98/ F: (33)1.47.31.37.75
10/23-27/2000 Paris	EURONAVAL (1)(2) / Naval Equipment GICAN T: (33)1.47 36 80 80/ F: (33)1.40 93 57 72
10/2000 Paris	IPA (2)/ Food Manufacturing CEP Expositorium T: (33)1.49.68.54.33/ F: (33)1.47.37.74.38
11/20-24/2000 Paris	EMBALLAGE (1)(2) / Packaging Equipment Exposuim T: (33)1.49.68.54.41/ F: (33)1.49.68.54.45
11/2000 Paris	SIRCOM / Mobile Communications SIRCOM SA/Exposuim T: (33)1.49.68.51.85/ F: (33)1.49.68.51.78
12/4-8/2000 Paris	ELEC (1)(2)/ Electricity & Automation Elec Promotion SARL T: (33)1.53.23.99.99/ F: (33)1.53.23.99.70

- (1). The U.S. Government is participating and supporting this event
- (2). Every two years
- (3). Every six months
- (4). Every three years

